User's Guide for the program

Version 3.46

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Optimik

OPTIMIK is a universal software tool that allows you to keep records of jobs, documents, products and stocks easily and conveniently. It offers functions for automatic pricing, calculations of cutting plans for panel and bar materials, automatic conversion of dimensions of product components and many other features. It is primarily designed for manufacturers of furniture and other products from panel and bar materials (wood, metal, glass), but some its modules (documents, stock, directory) can be also used universally.

OPTIMIK uses the robust Firebird database, has intuitive control, and provides users with the possibility to edit and prepare print sets. Moreover, it includes an option of parametric start and data import and export. Given features make the software open for other applications and enables its integration into other application systems.

Installation

System Requirements

OPTIMIK is designed to run under Windows 2000, XP, Vista, 7, 8. It can be fully operated under the typical configuration of today's computers, which largely depends just on a used version of Windows operating system.

Installation of the software

Install the program by running the setup file optimik_setup.exe (you can download it from the website www.optimik.com). After selecting the language and clicking the "Next" button the license agreement displays. Please read it, and if you accept it, please select "I accept the license agreement" and click "Next". If necessary, you can change the installation folder (the default is installed in the C:\RK Software\Optimik) and start the installation by clicking "Next". After copying the necessary files into the instalation folder the installation process is completed by click "Finish".

Network installation

1. *OPTIMIK installation*
   Install OPTIMIK on the server and also to all other clients computers

2. *Install Firebird SQL Server*
   Install on the computer which will serve as server Firebird SQL Server (you can download it from our sites www.rksoft.sk). After installation, Firebird SQL Server will run automatically at Windows start-up as a service. If there is firewall installed (activated) in computer, it is necessary to "open" port 3050. For example firewall for Windows XP it is necessary to click on Start – Control Panel – Windows Firewall and the tab "Exceptions" to add the port (name: Firebird SQL Server Port number: 3050).

3. *Create database*
   Run OPTIMIK on the server and create there local database (e.g. with name OptimikDB in the folder C:\Data).

4. *Run OPTIMIK on the clients computer*
   First make sure that the clients computer has access to server and in the firewall communication is allowed via port 3050 (as described in point #2 above). Run OPTIMIK on the client's computer. Use following login data :

   - *Server*
     the name of the computer where Firebird is installed and running or its IP address

   - *Database name (alias)*
     enter here complete name and pathway to database (from the server point of view) e.g. "C:\Data\OptimikDB.fdb". If needed you can also use for this database alias (nickname), which you can define on the server (more information is available in the OPTIMIK manual).

   - *Password*
     password to the database (default value: "masterkey"). When entering the password, it is necessary to distinguish between uppercase and lowercase letters.

Firebird Database System

The OPTIMIK program uses the Firebird database system (hereinafter referred to as FB) to access data. It is freely available, robust and a long-developed system that has low requirements for operation and servicing. FB description and links to other sources of information can be found on the site www.firebirdsql.org. Part of the OPTIMIK installation software is the so-called FB built-in version, which combines the client and server part of FB (it is used to access a local database) as well as a separate client part intended to be used for an access to regular FB server (it is used to access the Client-Server database).

Local database

The local database is located directly on your computer and the program accesses it directly. The database may not be accessed by several users at the same time.

Database on the server

This database is located on a server (i.e. on the computer where you have installed the FB server) and the program does not access it directly, but through the FB server. It may be used by several users simultaneously, however, each record can only be edited by one user at the same time (if a record is being edited by a user, it is unavailable to other users until performed changes are confirmed or cancelled). Other users can only read the record, but may neither change the record nor cancel it). Following any such change in data, this data is automatically updated for all other logged users. It means the program automatically uploads all the changes made by any other users into corresponding tables. This method of access requires the installation of the FB server on the computer with database.

Database Security

FB allows securing of the database only at the level of the database server. The database itself does not contain any login passwords or encryption. This means that anyone who obtains a database can easily gain access to it after a new FB installation. The entire security thus consists of location of the database in a folder that is not publicly accessible to other users. In the case of a database located on the server, it can therefore be a folder that is not allowed to be shared; in the case of a local database (that has no means of verification at access), we therefore recommend storage of the database at least in a personal folder "My Documents". If data encryption is required, it is necessary to use some external applications (e.g. TrueCrypt freeware - www.truecrypt.org/ - that create a virtual encrypted disk where you can hide your database. The drawback of this solution is somewhat slower access to the database and the fact that an unencrypted database is readable during work with the program.

Basic steps for securing the database:

Change of SYSDBA password

A user with the "SYSDBA" username and "Masterkey" password is automatically created at FB level after installation. Since this data is generally known, it is strongly recommended to change this password even before start of the program and creation of a new database. Make your change using the gsec tool, which is a part of the FB installation. The direct command to password change is C:\Program Files\Firebird\Firebird_2_5\bin\gsec.exe -user SYSDBA -password masterkey -modify SYSDBA -pw new password. A change to the password does not affect local databases (i.e. those to which the program accesses directly and not via a server). The max. password length is 32 characters and only the first 8 characters are important. The password is case-sensitive

Creation of database alias

From a security point of view, it is recommended to conceal the location of the database on the server from users. Consequently, the program accesses the database using the database's alternative name "Optimik" (the so-called alias). The exact path is then entered into the file aliases.conf, located in the folder with the installed FB – by default it is C:\Program Files\Firebird\Firebird_2_5. You can thus save the database anywhere on your computer by simple entering its path into the aliases.conf file, for example in the form "Optimik = D:\My Data\ Optimik.fdb.

Program Start

You can start the program by double-clicking on the "OPTIMIK" icon located on the desktop. An introductory window with database login data will appear first (it is possible to disable display of the window and login to the database automatically) :
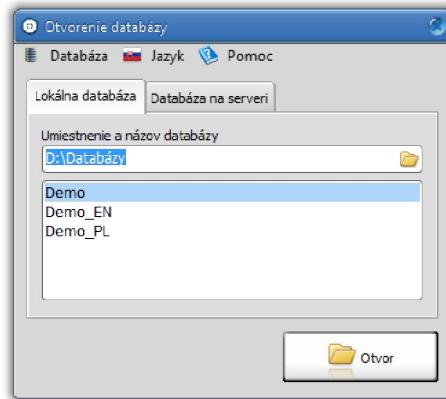
Local database

To connect to a local database you need to select a folder in which the database (*. Fdb file) is located, and selects its name. In the case of a local database, no password needs to be entered.

Database on the server

To connect to a server database you need to specify:

- *Server*
  Name of the server (computer on which FB is installed and running) or its IP address, in the case of the "Client-Server" database (if the program is installed directly on the server, use the name "localhost")

- *Database name (alias)*
  enter here complete name and pathway to database (from the server point of view) e.g. "C:\Data\OptimikDB.fdb". If needed you can also use for this database alias (nickname), which you can define on the server (more information is available in the OPTIMIK manual).

- *Password*
  password to the database (default value: "masterkey"). When entering the password, it is necessary to distinguish between uppercase and lowercase letters.

Database

Creation of a new database
This function creates a new blank database that will contain only some predefined (mandatory) data – e.g. basic stock groups, basic types of documents, initial currency (obtained from the national system settings), standard print sets etc. Each database you create includes some predefined data (e.g. names of print sets, names of main stock groups, etc.). This data will be created in your currently selected language (if necessary, you can change the language by clicking into Menu-Language even before creation of a database). A Client-Server database can be only created in the program installed on the server.

Creation of a new database from original OPTIMIK software

If you were using an older OPTIMIK software (developed from 1999-2006), you can use this function to create a new database and, at the same time, automatically transfer your data from the original software into the new database. Data conversion takes place in a separate window immediately after entering the name of the new database. In this window, you need to select a folder with the data files of original OPTIMIK software (by default it is C:\Program Files\Optimik\DataFiles\) and choose whether you also want to transfer jobs, formats with negative stock, and products (sets).

Moreover, you will have to carefully set the parameters, which cannot be changed later (as the database will already contain data):
- Unit of measurement for panel materials
- Unit of measurement for bar material (edging strips)
- Thickness of the most widely- used panel materials
- Thickness of the most widely- used edging strip

The specified thicknesses will be automatically set for all panel materials and edging strips at conversion. If some materials have different thicknesses, the settings must be manually corrected in the stock records. This solution is necessary because the original OPTIMIK software did not contain an option to specify the material thickness.

Data recovery from backup

This function enables the recovery (overwriting) of a current database using data from a selected backup file. The function will permanently overwrite current data, so you should not forget to back it up first! Database recovery can be only done if no user is logged on.

Note:

For security reasons it is not possible to create or restore a database in client program installations (only in Optimik installed on a server or using a local database).
Database can not be directly deleted from the program. If necessary, you may do so only by a physical deletion of the database file.

Open database

After you click on the "Open" button, the database opens and the main program window is displayed. However, a login screen can appear before the main program window, if necessary.If several users are registered in the program or there is login password, assigned to an "administrator", a window requesting selection of a user and login password is displayed at startup. The program will only start when a correct password is entered.
Passwords are stored in an encrypted format in the database, but they are only intended to secure an access to the program. Please also read the detailed information on database security.

- Note:
Some parameters can not be stored directly in the database, because the program needs to know them before opening the database. These are:
  - data for logging in to the database;
  - program language interface;
  - appearance (skin) of the initial window;
  - display options for the initial window allowing to select a database.

 Selected displaying of the initial window

  These parameters are therefore stored in a separate configuration file setup.ini, which is located in the Optimik folder, located in My Documents system folder.
  If necessary, you can copy this file to the program installation folder (for example, if you want to install multiple instances of the program on one computer, and you want to run each of them with different configuration).

Program Control

Tables

Below each table, there are buttons for adding, editing and deleting records (these functions can be also triggered using keyboard shortcuts):
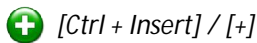
[Ctrl + Insert] / [+]
add a new record to current table

[Alt + Insert]
cloning of the record in current table (creating a new record copying the current one) –this function is available only for some of the tables

[Ctrl + Enter] / [*]
edit current entry in table

[Ctrl + Delete] / [-]
delete current record in table

Data sorting in tables

Data in tables can be usually sorted according to any selected column (columns). Numerical values (such as weight, price, etc.) are sorted in the table according to the values; other data (including numbers of documents and contracts) are sorted alphabetically.
You can choose a column by clicking on its heading. The selected column is indicated by a gray triangle in the right section of the heading. Default sorting is set to ascending. If you want to change the setting to descending, click on the heading again – sorting is changed and the gray triangle turns. To sort the table according to several columns at once, click the headings of desired columns while keeping the Shift key pressed down.If an indicator (gray triangle) doesn't appear after a click on a column heading, the column cannot be used as a basis for data sorting in the table.

Searching

Text search functions are available in the selected modules (stock, business partners).

Enter the desired text in the edit box (located on the right side under the table) and click the button to start a search for that text. You can enter only a part of the text. The text is not case-sensitive. After entering the text, the program searches through all text data of each record in the table from the beginning and indicate lines in which the text was found. To continue searching through other records, click the button again or press the F3 key (only if you enter new text, the table will be searched from the beginning). If the program does not find such (or next such) record, a sound signal will be emitted.
In some tables (e.g., business partners, stock items, specifications …), a quick search feature is also available – simply press the key that corresponds to the name of the searched item.

## To view comments and multi-line descriptions

Records that contain a comment (description) are in the table identified by the symbol (located on the right side of the "Name" column). The comment is displayed below the table (first two rows). By clicking on it, you can view it in full in a separate window.

Setting the size and position of windows

You can change the position of all windows (except for introductory ones) by moving them (dragging the window heading) to a desired location on the screen. You can also change the size of some windows (except for editing ones) by dragging their edges. The position and size of all windows will be automatically remembered for each of logged user , which means that each user can have his own individual settings of window sizes and positions in the program.

Tree Structure

Stock groups, product groups and groups of addresses are recorded in the form of the so-called tree structure. It means that individual items are not placed at the same level, but each item can be superior to another item, which, in turn, can be superior to another item, thus forming an image of a branched tree (folders on your computer harddisk are arranged similarly). An advantage of this solution is that it provides a clearer breakdown of groups compared to common alphabetical order:
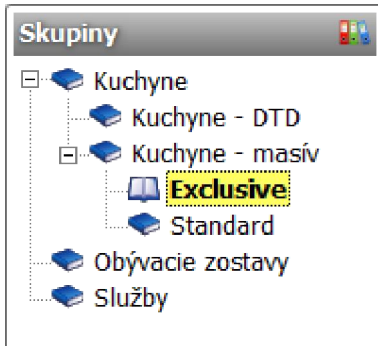
At program startup, you can only see top-level records in the tree structure. A [+] icon, is located beside the records that contain sub-records. After clicking the icon, the records are "unfolded" and the icon is replaced with a [-] icon (you can use it to "fold" the records back).

Before adding a new record you first need to move onto the record to which you want to assign the new record (the current record will be superior to the new one). If needed, you can assign any record (including all its "sub-records") to another record. To do that, left-click on the assigned record whilst keeping the CTRL key pressed down, then move the cursor above the required superior record and release the key. The method cannot be used for the transfer of records created by the program on its first start (they are not assigned to any other record).

Filters

Some tables in the program can be filtered, i.e. set to display only the records that match specified filter criteria.


Filter on

Clicking on the icon you can select the criteria according to which you want to filter records, and enter their values or ranges of values. Clicking "OK" after selecting and entering closes the window and only the filtered records are displayed in the table. At the same time, an overview of selected filter criteria is displayed above the table.

Filter off

Clicking on the icon . Upon the filter deactivation the program remembers the last-specified filter criteria until its closing.

Setting table columns

Almost all the tables in the program can be customized to your needs or preferences. Just click on the icon to the right and set the order and hide/show of the particular table column in the window which will appear. You can change the column width by dragging the right edge in the column title. Table settings are automatically saved separately for each logged in user.
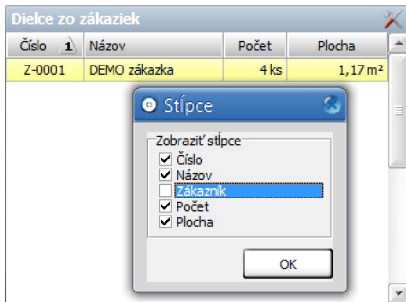
Entering data

Monetary data

Monetary data shall be entered in the initial currency in all parts of the program (except for documents in foreign currency). The currency is mandatorily recorded in the currency records (it is set up by the program according to the national system settings at creation of a new database program) and can only be changed after creation of a new database or, to be more exact, if no financial information has been entered into the system yet.

Entering dimensions

Dimensions can be entered in several units of length: millimetres, decimetres, centimetres, metres, decimal inches, inches, feet and inches.
The basic unit of measurement can be selected in the program settings. If you need to enter an individual dimension in another unit, you can switch the edit field to a desired unit by pressing a key :
M - millimetres
C - centimetres
D - decimetres
T - metres
I - inches
N - decimal inches
F - inches and feet
A dimension can be entered in any of above units; it is always converted by the program when saving into the database.

When entering the dimensions of panel material, a consistent terminology is observed in the program:

Length
> a "horizontal" dimension in direction of grain, if any

Width
> a "vertical" dimension cross grain, if any

Entering data by their selection from Another table

Some data is not directly entered in records, but taken from another table (records) - for example, a customer in Job shall be chosen from Business partners, account in Document is chosen from Bank accounts etc. This solution enables faster data entry, prevents data duplicity in records, and provides an option of exact filtering. Selections are carried out by clicking on the button :

In the window that is displayed afterwards, select needed record from the table by double click, pressing ENTER or by clicking button placed in the right down corner of the window. When needed, you can cancel the selection by pressing key Esc or closing the window.
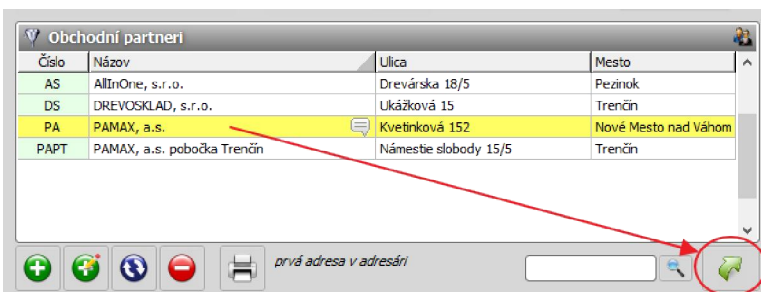
After selection, data will be shown on button :

- Important warning !!!

  Since the tables do not contain data of a selected record, but only a link to such a record, please be careful when editing these records. All their changes are automatically reflected in all "superior" records where the sub-records were used (selected). Example: If an address of a business partner is changed, do not edit it, but create a new address, marking the original one as "invalid". This will ensure that the address remains unchanged in older documents where it had been used.

Print

Print sets are created in the program using the built-in FastReport® tool (http://www.fast-report.com). The program thus provides control over the content and number of print sets. You can use the program to edit existing print sets or create your own reports.

Location of files with print sets

All print sets are saved in files with extension "fr3" and located in the PrintSets folder, which is located in the installation folder (if you do not change its location during installation, it will be C:\Program Files\RK Software\Optimik). The name of each file is in the form of "XX-Nazov.fr3" where XX is the mark of table (or another part of the program) which the print set relates to (e.g. "Z" indicates jobs, "ZV" job products, "S" stock items etc.; this mark is also shown in a heading of the window, where print sets are selected). The name of a print set itself is located behind dash (mandatory sign). Print sets supplied with the program are identified only by a code instead of a name. A name is automatically assigned to these sets according to current language.

Selection of print set

After clicking the "Print" button (or Menu item), a window with a list of print sets opens. In case there is only one print set assigned to a particular table, program does not offer a selection, but displays immediately this print set. If there are more print sets, but you insist on printing out one particular print set without manual selection, set this as "main print set". Main print set is in fact printed automatically so the selection window does not display. But, in such a case that you need to display this selection window, start print by clicking into Menu.

After selection of a print set and clicking the "Print" button (or pressing the Enter key or double-click), a full-screen window with preview of the print set with data is displayed. Buttons with these features are available in the upper bar of the preview window:

🖨 Setting up the printer and start of print

📂 Opening a print set with data from a file

💾 Save your current printing report data to a file

⏮ Move to the first page in the case of a multi-page print set.

◀ Move to the previous page

▶ Move to the next page in the case of a multi-page print set.

⏭ Move to the last page
You can also display the desired page by entering its number in the edit field (it needs to be confirmed by pressing Enter key)

🔍 Zoom out the preview

🔍 Zoom in the preview
You can also directly enter the desired scale (size) of display in the edit field (it needs to be confirmed by pressing the Enter key).

🗒 Automatic setting of the scale to display the entire width of the page

🗒 Automatic setting of the scale to full-screen display

📄 *Display/hide thumbnail pages*
Thumbnails are displayed in the left part of the window and are intended for a quick visual overview of all pages of a print set. Clicking a selected thumbnail will display a preview of the respective page

📄 *Export print sets into a PDF file*
Export may be only performed by authorized user.

📄 *Export print sets into a CVS file*
Export may be only performed by authorized user.

✏ *Edit a structure of the print set using the built-in tool FastReport®*
Print sets that are delivered with the program (all those that are designated solely by a numerical name) can not be edited directly. The program will first prompt you to create their copies with a different name. This process is important to secure your edited sets if you need to reinstall the program. In such a case, all standard print sets shall be overwritten by their newer versions !!!

❌ Close the preview window

About program

Optimik contains 6 modules that can be used based on the user's needs :

Jobs

Here, you can register each of your orders, including all products and items contained in it. Optimik automatically calculates its price, weight and creates a list of material that is needed to fulfil it. For all the parts, it allows to create cutting plans and it automatically records on which cutting plan the part is located. You will thus neither forget to cut a part nor cut duplicate parts anymore.

In addition, you can automatically create for every order any document (offer, invoice), issue all the necessary material from a stock and thus you will keep control of your stock levels.

Cutting Plans

In this module you can create panel-based and length-based cutting plans for parts belonging to orders and/or for manually entered parts. In the calculation, Optimik tries to ensure the best use of all possible formats and cut-offs of the material chosen. It is also possible to issue a material requisition slip to each calculated plan, based on which all the used material formats can be issued from stock and newly created cut-offs can be added to stock. Automatic creation of accounting document showing i.a. the price for cutting and attaching edging strips is a matter of course. The CNC version also allows exporting the cutting plan for CNC panel saws of selected manufacturers.

Products

Products that you manufacture in series (or at least occasionally) do not have to be manually entered in orders. You can register them in this module and add them to orders easily from this module when necessary.

Each product may contain any number of parameters indicating its size or characteristics. These parameters can be used in defining material, size or quantity of each of its parts. After changing any parameters of the product, Optimik can itself recalculate and adjust all necessary parts, which allows you to achieve further time savings.

Stock

Inventory of sheet and linear material (including all formats and cut-offs), edging strips, other materials, goods and services, including their individual parameters (type, prices, taxes, weight, colour, thickness...). These items can be simply entered only once and Optimik will then monitor all their receipts, issuances, inventories, and current value. You can use them in all orders, cutting plans, products and documents without the need to input them manually.

Documents

In this module, you can create and record all types of necessary documents – offers, invoices, receipt slips, issue slips (or custom documents, if necessary). Each document can contain manually entered items as well as items selected from the stock. Based on these items, Optimik calculates the final price and taxes and will also adjust the inventory levels in the stock correspondingly. Some documents can be also created automatically – e.g. an offer or invoice for a particular order, material issue slip for an order and cutting plan, accounting document for a cutting plan.

Business partners

In this module, you can keep records of all your business partners, their addresses, contact details, individual discounts and other important information related to them. You just once register each business partner and then you can assign such partner to any document or order.

Other

Database back up, data import, information about program and etc. Functions are described in details in the closing chapters ...

The following chapters describe the fundamental procedures used when working with Optimik...

Jobs

The "Jobs" module is intended for recording jobs and their status, price calculation and the calculation of weight, and used as a starting point for recording the components and tracking their processing in cutting plans. Each job contains products and each product consists of components (items). Jobs, products, and their items are recorded in separate tables. Job price is calculated as a sum of product prices, where the price of each product can be fixed or an automatic calculation of prices can be allowed. In this case, the price is calculated on the basis of stock (calculation) prices and the quantities of individual items. In the program settings, you can specify whether to calculate the price using the purchase prices of its components, or using their stock prices increased by a specified margin. All the prices in jobs are without tax.

Job

Products, materials and parts displayed in this window belong to the current order, the title of which is shown in the top bar. Another order can be quickly selected from a list that appears automatically when you move the mouse cursor over the top bar (provided this feature is enabled in the program settings).

Complete list of orders can be also displayed by clicking on the "List" button or by pressing F2. For more information, see the "List of orders".

Products

List of products of the current job. Products, whose price is calculated automatically, are marked by the symbol in the last column.
There are three ways to add a product to a job:

Using a copy from the product records
automatic assignment of the selected product and all its items from the product records. For more information, see the chapter entitled "Products – Adding a product to an order".

Manual creation of a product
the standard way, by clicking the "New" icon or into "Menu-Product-New"

Job Calculation

Job price is the sum of the prices of all its products. It is possible enter manually or allow automatic computation of individual product prices (in such case is the product price calculated as sum of prices of all its items and is rounded in according to parameters defined in the program settings).

The "Calculation" table shows a list of all stock items used in the job, each with automatically calculated total quantity, weight and price. Unit price, over-consumption and item weight are transferred from the stock, and any potential changes of these parameters in stock will be not taken into account in the job (if necessary they can be updated via a separate function – see below). In the program settings, you can select what price should be used in the calculation - the options are the retail price or the stock price increased by the specified margin.

Total quantities of stock items consist of :

- *basic quantity*
  quantity entered directly in the product item

- *associated quantity*
  if this item appears in the associated operations

Basic and associated quantity is also increased by so-called over-compensation (if specified), i.e. percentage of waste during processing. Quantities are reported in corresponding specific units, while for panel and bar material is informatively calculated also the total number of parts. In the event that a given stock item has allowed only an integer number the total quantity will be then calculated automatically rounded up to integer number.

Information about the issued quantity of given item is listed in the last column of the table. There may occur one of the following parameters :

- *percentage value*
  quantity (in %) delivered/issued from the stock or was included in cutting plans (in case of panel and bar materials). Still remaining quantity is to be delivered/issued from the stock.

✔ *in case needed quantity is issued from stock*

⚠ *in case that excessive quantity is issued from stock*
this can happen in case that a certain item is issued from stock and later its quantity in job is decreased

🌐 Edit

Clicking this button menu displays, in which you can select one of the following functions :

🌐 *Edit record*
Information about material and its quantity computes the program automatically (from the list of products and their parts) and it is not possible to change it manually. With help of this function you can edit some other information of the material – e.g. the description, sale price, overconsumption , note ...

Bulk material or operation change

This function can be used when you need to change selected material or operation (stock item) in all items of given products or in all products of current job. All you need to do is to select different stock item of the same type and click on "Change". It is not possible to change panel or bar material of which parts were included in the cutting plan.
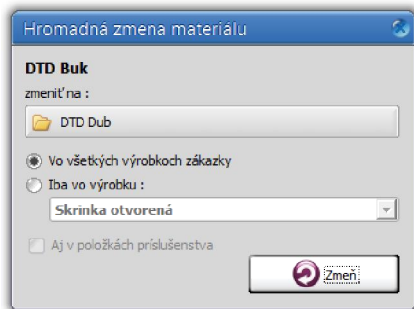
Update according to the stock

This function updates unit price, overconsumption and unit price of all items in accordance with current values in stock

Update accessory

This function allows you to each accessory (used in the current job) again to retrieve the list of items of auxiliary registers "Accessories". This can be used if you are deleted or modified any of the items, and you want refresh it in the current Job.

Cutting plan

Using this function, you can add panel and bar components of the job in the cutting plans. All materials of all components of the job that have not been assigned to any cutting plans will be displayed in a list in a separate window. After selecting materials (you can select them individually or collectively - by right-clicking on them and choosing "Select All" or "Deselect All") click on the "Add to cutting plans" button. All components from the selected material will be assigned to the cutting plan.
If there is any cutting plan not yet calculated, the components of the given material will be assigned to it, otherwise a new cutting plan will be created for them.

After adding components to the cutting plan, its number will be shown on this button. Use the button to open automatically the "Cutting Plans" module at any time and to search it for this component.

Create issue card

Using this function it is possible automatically create issue card and issue from stock (deduct) all items and their quantities needed for completing given job. Function runs in separate window, where you can determine to which items this record will apply (stock items of the type " Operation/Service" will be recorder regardless of the following selection) :

- *Issue only item with sufficient reserve*
  from stock will be issued only items whose quantity is greater than their reserve in the stock

- *Issue all the items in the quantity which is not exceeding current reserve*
  all items will be issued from stock, but only up to the current stock reserve

- *Issue all items regardless of the reserve*
  all items will be issued from stock regardless of the current stock reserve (ATTENTION! Negative balances of stock items can occur when selecting this option even though they are not allowed in the program settings)

Items

List of items of current product.

Cutting plan

If the current panel part is already placed in a cutting plan, you can find and display such a plan easily by clicking on this button. Otherwise it will be added to the cutting plan with the other panel parts made of the same material (even from more orders at the same time, if necessary).
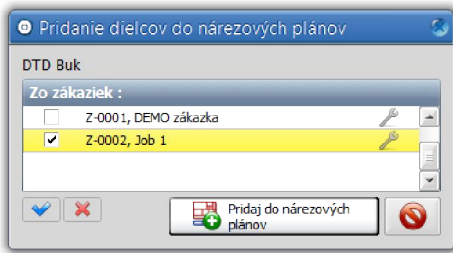
List of jobs

Groups

Jobs can be classified into groups that you can create and edit through Menu-Group-New/Edit/Delete. The group name can consist of up to 60 characters. The current group is displayed at the top right above the table. You can edit it there as well.

Jobs

A list of jobs of the current group. In addition to the basic data, the table shows the number of days remaining to the job deadline and the last column shows the symbol indicating the current status of the job. The job status can be changed by double-clicking (or clicking Menu-Job-Change status ...). In a window that appears, just click the button indicating the current status:
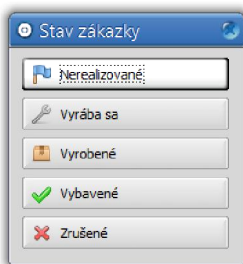
In addition to the basic buttons, the "Create a document" button is located under the table. You can use to create a new document of the selected type for the current job.

Document for Job

The program uses this function to automatically create a new document (you can choose its type – e.g. Offer, Invoice) and copy all necessary data from a current job – i.e. information on a customer, discount rate (it can be changed if necessary) and products.
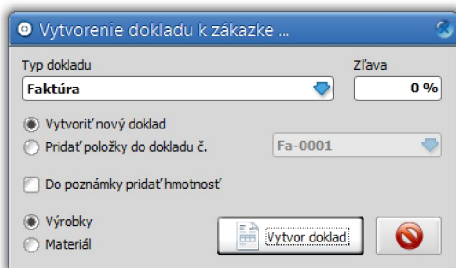
All items transferred from a job to a document will be considered "free", i.e. they will have no impact on stocks. The created document will be added to the records of evidence , where you can further edit it or print it out, if needed. You can create an unlimited number of documents from a job, but they are not in any way associated with the job.
Hence you can issue a new list of offers with a new job, another list of offers after any modification to the job, order sheet or binding order before commencement of the job implementation and an invoice after completion of the job.
Document, that helps you to issue material needed for the job from stock, can be done via "Create issue card" (button under the table "Calculation").

Cutting plan

Clicking this button you can add to cutting plans in bulk, parts from all jobs (which are in a status "Produced") and from selected materials.
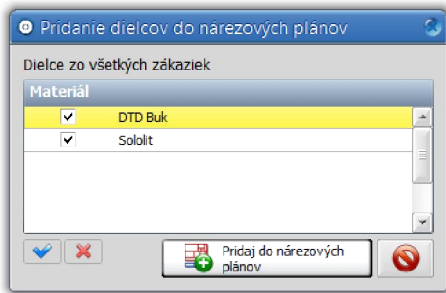
Materiál	
✔	DTD Buk
✔	Sololit

Job

Number

Number of a job. It is automatically created based on the numbers of the last two jobs (the first two jobs must be numbered manually). Number can be edited, the program, however, does not allow creating two jobs with identical numbers. Jobs can be sorted according to their numbers, but only in alphabetical order. If you need correct sorting results, use leading zeros in the numbers (not Fa-1, Fa-2 .... Fa-9999, but Fa-0001, Fa-0002 .... Fa-9999).
A complete number uniquely identifies a job at data import and export.

Date

Date of registration of a job

Deadline

If you accept this option, the program will allow entering also the job completion date. Based on the specified completion date and actual date, the program calculates the number of days remaining to complete the job, and shows this value in the jobs table. The program indicates an expired deadline with three exclamation marks. When entering a new job, the program offers a deadline calculated on the basis of the current date and number of days predefined in program setup.

Customer

Selection of a customer's address from the Address book.

Parameter

Job name - max. 60 characters

Description

Description of a job - a multi-line text

Additional discount

An amount of discount ranging from -300.00% to 100.00%. If you enter a negative number, the value will be considered as a surcharge. When recording a new job, the program will offer the discount that has been assigned to the customer in the business partner database (if the customer is selected).

Order

Information on an order, if any - max. 60 characters

Status

Here, you can select the current status of the job. A status is identified by an icon in the orders table:

Non-performed

In production

Performed

Completed

Cancelled

Group

Here you can select or change the group to which this job will be assigned.

Job Product

Number

Serial number of a product in a job. The program automatically assigns the number, but you can change it. In such a case, all the products concerned will be automatically renumbered. This number is only used to identify a user-defined sequence of products in the job (if your products table was sorted according to the number - the column is marked with a #).

Code

Unique information that uniquely identifies a job product at data import and export. Its max. length is 25 characters.

Parameter

Product name - max. 60 characters

Description

Product description - a multi-line text

Image

A product can be assigned an image by selecting it from the image register.

Quantity

Nuber of products in the job

Automatic price calculation

If you confirm this option, the program automatically re-calculates the price of a product after each change in the list of its items (based on the number of items and their stock (calculation) prices. In the program settings you can specify whether to calculate the price using the purchase prices of its components, or using their stock prices increased by a specified margin. If you uncheck this option, the program will allow you to enter the price manually.
Products that have this selection confirmed are identified in a table by a icon.

Price

Manually entered price of the product (it is available only if you do not want the price to be calculated automatically)

Manual creation of a virtual product

you create this type of "product" if you want to add to a job (and into a document created based on the job) the items that are not directly included in a particular product, but relate to entire job (e.g. transport fees, assembly charges, etc.). A virtual product is created when you click the "Menu-Product-New (other job items) (you can also enter its name and description)

Product item

Material (stock item)

All items of a product must refer to existing stock items. After clicking the button, a window opens in which you can select required stock item (including any associated operations) by double-clicking (or by clicking the "Select" button). You can also select operation separately by clicking on the small button in the right. Depending on the selected item, you can specify other parameters – dimensions and edging strips in the case of panel materials, length in the case of bar materials.

Quantity

Quantity (number of pieces) of a selected item. The unit of measurement cannot be changed - the standard measurement unit of a stock item is used. Panel and bar materials represent an exception - their quantity is always specified in the number of pieces.

Length

Length can be only entered for panel and bar materials. For more information on length units, see chapter "Entering dimensions". A panel or bar component may also include more lengths - this can be used if the material has a grain which should visually continue on individual components (for example, in the case of drawer fronts, cabinet doors, etc.). You can add another dimension to an item by pressing the button. If a component contains more dimensions, a control element with the number of the actual dimension is displayed above the edit field. You can use this feature to switch between individual dimensions (you can also move to the next or previous dimension by pressing the PageUp and PageDown buttons, respectively). If you reset any length, it will be automatically deleted at saving.

Width

Width can be only specified for panel materials (the width of bar materials is specified in a stock and displayed here only for information purposes). Other steps are similar to the specification of length(s). You can add more widths by pressing the button.

Follow a grain

This option is available only for panel components that do not include more lengths or widths. Confirmation of the option means that if a material has an oriented grain (this is defined in a stock item), a component may not be turned (width may not be changed to length and vice verse) when being saved in a cutting plan. This is used for the components that will be visible in a product, if changed orientation of their grain would cause an aesthetic defect. Components that have this choice confirmed are identified in the table of items by a icon.

Rotate the part

When you click this button, the dimensions and edging strips will be rotated in relation to the material drawing.

Code

Item identification code - max. 25 characters

Parameter

Item name - max. 60 characters

Description

Description of item - multi-line text

Edging strips

This tab is only available for panel components. It allows you to assign edging strips (individually for each edge). Click on the corresponding button to select the desired strip from a stock. After selecting the strip, its thickness (as specified in a stock) is displayed in the edit field (to the right of the button). The program then automatically reduces the dimensions of a component on the cutting plan by the thickness (modified dimension is shown under image of the component for information). This ensures that the finished component with stuck-on strip will have the desired dimensions.
At the same time you can also enter a dimension here which will be automatically added to the edge of a panel component containing an edging strip (it is necessary if you need to grind off an edge by the dimension even before the strip is applied to the edge).
If option "Do not adjust part dimensions" is confirmed, the part will have in cutting plan dimensions as set (that means the parts will be not decreased by the edge strip thickness or differently adjusted).

Accesory

Others

Cutting Plans

The "Cutting Plans" module is designed to record and calculate cutting plans. Each cutting plan contains components that can be entered manually or added from jobs. Each calculated plan includes statistics and a list of formats used (panels) and cut offs that can be automatically entered into the stock.

Cutting Plans

List of cutting plans. Apart from the basic data, there is a symbol for each cutting plan, which identifies its status (if there is no symbol it means that cutting plan was not calculated or its computation was cancelled):

   setting and running computation of the cutting plan

   cutting plan was computed and issue card was assigned to it

Items

List of components of the current cutting plan. Components can be edited and deleted only if the cutting plan has not yet been calculated (components from jobs can be edited only in the "Jobs" module).

Typ	Zákazka	Výrobok	Dielec	Názov	Dĺžka	Šírka	K...	Množstvo	Hmotnosť	Neumi...	Zá...
	Z-0001	K-ZK	B	Bok	782 mm	373 mm		6 ks	9,91 kg		
	Z-0001	K-ZK	V	Vrchná doska	446 mm	396 mm		3 ks	3,02 kg		
	Z-0001	K-ZK	S	Sokel	414 mm	50 mm		3 ks	0,35 kg		
	Z-0001	K-ZK	D	Dno	414 mm	398 mm		3 ks	2,78 kg		
	Z-0001	Skr-SO	B	Bok	614 mm	396 mm		8 ks	11 kg		
	Z-0001	Skr-SO	P	Polica	409 mm	381 mm		8 ks	7,12 kg		
	Z-0001	Skr-SO	VS	Vrchná a spodná doska	446 mm	396 mm		8 ks	8,06 kg		
	Z-0001	S1	P	Priečka	646 mm	346 mm		4 ks	5,1 kg		
	Z-0001	S1	V	Výztuha	448 mm	218 mm		4 ks	2,22 kg		
	Z-0001	S1	D	Doska	946 mm	676 mm		1 ks	3,62 kg		
	Z-0001	S1	S	Stĺpik	264 mm	748 mm		4 ks	4,5 kg		
	Z-0001	S1	R	Rozprerka	250 mm	240 mm		10 ks	3,36 kg		
	Z-0001	S1	S2	Stĺpik2	146 mm	528 mm		3 ks	1,34 kg		

782 x 377 mm
(782 x 373 mm)
= ABS Buk

Dielce   65 ks   10,9865 m²

Zákazka Z-0001

Edging strips for components from jobs:

- *these may have associated operations*
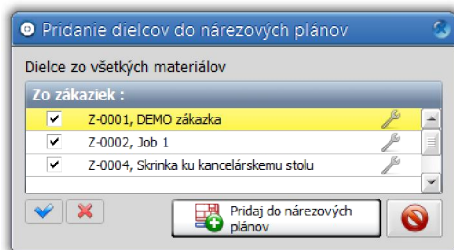- *they are issued from stock using an "issue card for a job"*

Edging strips for manually entered components:

- *these cannot have associated operations*
- *they are issued from stock using an "issue card for a cutting plan"*

Add components from the Jobs

After clicking on this button a window appears with a list of jobs listing components of the current material that have not yet been associated with any cutting plan. After selecting jobs (you can select them individually or collectively - by right-clicking on them and choosing "Select All" or "Deselect All") click on the "Add to cutting plan" button. All components from the selected job and of the selected material will be assigned to the current cutting plan.

If you need to add components from multiple materials at the same time, click to the button with same icon in window "List of cutting plans". If there is any cutting plan not yet calculated, the components of the given material will be assigned to it, otherwise a new cutting plan will be created for them.

Pridanie dielcov do nárezových plánov

Dielce zo všetkých materiálov

Zo zákaziek :

✔	Z-0001, DEMO zákazka
✔	Z-0002, Job 1
✔	Z-0004, Skrinka ku kancelárskemu stolu

Pridaj do nárezových plánov

Parts that have been added to the cutting plan from jobs are listed in the last column of the table and marked.

Jump to Job

The button is available only for components that have been added to the cutting plan from a job (the button shows the number of the job). After clicking on it, the "Jobs" module will display and the respective job and component will be automatically located in the table.

Computation

Setting and running computation of the cutting plan. For more informations, see the next chapter.

Used formats

List of formats that were used in computation.

Computed cutting plan

View on the layout of components on the current format. If the edge of the used format is longer than the size specified in the program settings, cutting plan is divided into several sub-plans. In that case, the next to the cutting plan slider appears, by which it is possible to display its individual sections.

Moreover, you can also change colours of lines, cuts, cut offs, waste, as well as the font size and colour, type of data etc. in the program settings.

Export for CNC cutting machines

In a separate window, you can export the current cutting plan for CNC cutting machine. Just select the manufacturer, folder to save the exported file and enter its name. The selected folder will be remembered by the program (different for each type of export) and it will offer automatically the file name in the following format "plan number, material code, plan name".
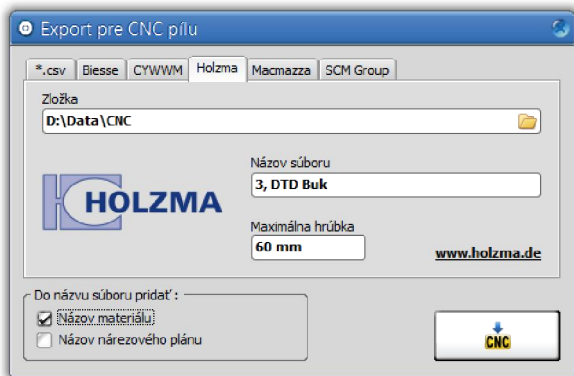
In the current version, you can export data for CNC cutting machines by Biesse (www.biesse.com), CYWWM (www.cywwm.com.tw) and Macmazza (www.macmazza.it). The exported file should be opened in the software controlling the specific cutting machine and to perform further necessary actions in it.

Moreover, data can be exported to a generic text file *.csv with the following structure

The file header contains information about the plan, components and material used:

Plan
Plan; Cutting plan number; Material name; Material code; Material thickness; Trimming of entire formats; Trimming of cut offs

Formats (list of formats used)
0 (entire format) or 1 (cut off), 0 (material from a customer) or 1 (material from stock); Format number; Length; Width; Number of pieces; Name

Edging tapes (list of edging tapes)
Code; Name; Number; Total length (including any over-consumption)

Parts (list of parts)
Serial number; Length; Width; Number of pieces; Job code; Job name; Product code; Product name; Part code; Part name; Tape code (top); Tape code (right); Tape code (bottom); Tape code (left)

Off-cuts (list of generated usable off-cuts)
Length; Width; Number of pieces

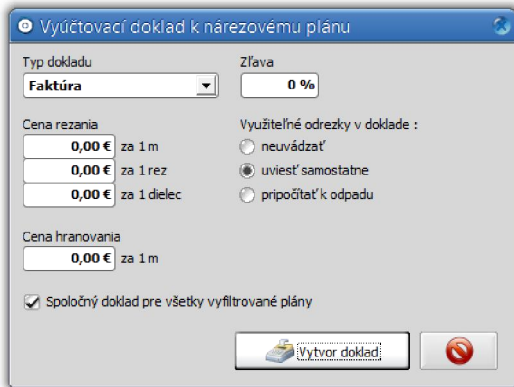*Below is a list of individual plans for each format used (and a list of components and their location on it)*
Format; Format number; Panel (layout) number; Number of pieces; Length; Width
Component number; X-coordinate of the upper left corner; Y-coordinate of the upper left corner; 0 (if the panel was placed without rotation) or 1 (if it has been rotated by 90 degrees); Component length; Component width

📄 Settlement document

Creating document with calculation of the cost summary for current cutting plan (optionally also for all filtered cutting plans). In addition to prices for material and edging strips, you can add also prices for cutting and strip gluing.

🚚 Issue card

Creating issue card for the cutting plan, through which from stock all the used formats are issued and all the new usable cut offs will return to stock (if given format in the stock does not exist yet, it will be automatically created). The cut offs are automatically priced according to the price of used formats using the FIFO method. If there is negative balance, program monitors if there is in the stock sufficient balance of all used formats. If not, it will be necessary to computer new cutting plan with current material reserve or add additional material to stock.

After creating the issue card, its number will be shown on this button and you will be able to automatically open the "Documents" module using the button and to locate the issue card there anytime.

Computation of the cutting plan

Split

Selection of a method of format splitting (direction of the first cuts):

- *Any direction of cuts*
- *To cut lengthwise*
- *To cut crosswise*

Cut width

Width of a cut (cutting gap)

Maximum cutting length

The maximum cutting length that can be made by your cutting machine (saw). Set the parameter to the desired value to force such a distribution of components that it will not be needed to make a longer cut at any point. Since the value considerably restricts computation and thus also decreases its quality, do not set it too low.

Cut-off minimum

Here you can enter the width of the thinnest cutoff that can be produced by your cutting machine or the smallest width that can be reached from the technological point of view. The program will then deploy the components so that there will be no need to cut a thinner cutoff at any point. The cutoff minimum is specified with a minimum width of cut, which means that if you want to specify a width of the smallest cutoff to be 20 mm and a width of cut is 4 mm, you have to specify the cutoff minimum width to be 24 mm. Since the value considerably restricts computation and thus also decreases its quality, do not set it too high.

Maximum number of turns

In most cases it is not possible to cut components using only the cuts in one axis, but it is necessary to change the cutting direction several times or turn the material by 90 ° when cutting. However, the number of "turns" (also called a number of levels) that can be made by a CNC cutting machine is limited. By setting a desired value you will make sure that the components will be distributed so that the number of cut direction changes needed to cut off any component will not be higher than the specified number of turns. You can leave the value as high as possible in the case of "manual" cutting. The lower the parameter the worse the results of computation, but also the less strain at cutting – the less material handling, and vice versa.

The table shows all the parameters of the selected product. If necessary, you can change any of them by entering another value (size, quantity, material...) in the right bottom corner, below the table. This change is temporary and applies only to the product that has just been added to the order (values of parameters entered in the product records remain unaffected). Parameters will be initialized after each change of the selected product, thus you should modify them only after selecting a product (step 1)! Optionally, the list of these parameters with default values can be automatically inserted in the product description, and/or you can change its code, name and number of pieces in an order.

In this way, products can be added in an order directly as well, using the "Orders" module (in such a case, however, it is not possible to select a different order, you can add products only to the current order).

Cleaning cut after a turn

If you enter this value the program automatically makes an additional cleaning cut after each change of direction (turn of material). The function is used by some CNC cutting machines for reaching the maximum cutting accuracy and perpendicularity.

Nesting of parts

- *unlimited*

- *side to side in one row*
  this can be used e.g. when cutting windowsill. In such case only the left and right edge of the format will be trimmed and for the usable cut off will be considered only right part of the format.

Addition for trimming

This value will be added automatically to the dimensions of each component. This is used in cases where you want to trim or grind off the components additionally to exact dimension. Example: if the addition for trimming is 100 mm and a component has a size of 600 x 450 mm, the component's size in the cutting plan will be 700 x 550 mm.

Trimming

If you specify this value the basic format will be trimmed by the value from all sides (or from the sides where a component or usable cutoff is located). Such a cut is considered as a cleaning one and serves for the removal of any damaged edges or for smoothig their other unevennesses. In the case of bar materials, only the ends are trimmed.

Trimming of cutoffs

A cleaning marginal cut, but applied to cutoffs. Cutoffs from the previous cuttings are presumed to have more exact dimensions of edges as well as smaller damages to the edges; therefore, this value is usually somewhat lower.

Trim all edges

If you confirm this option, cleaning cuts will be assigned to all edges (in the case of bar materials to both ends), otherwise the sides with waste will be without this trimming.

Use cut-offs

Here you can specify the conditions for using of cut-offs in cutting plan

Usable cut-offs

Here you can define the smallest possible cut off which you will still consider as usable by specification of a minimum length and width of such a cutoff. All cutoffs with the dimensions lower than specified will be considered as unusable waste. Enter these values with the utmost care, as too low values would fill your store with plenty of tiny cut offs and too high values would cause an unnecessary wastage of materials.

This allows you to define up to 4 different sizes of usable cut offs (A-D). The program automatically marks all the successor cuttings by this letter and enter them to the stock as well.

Quick settings of parameters

All parameters can be stored under one name in separate records of parameters of a cutting plan. These parameters is possible to assign to each stock item (panel or bar material). By each computation of the cutting plan for given material, program can automatically pre-define correct parameters (their common name is given on the button).
Before running the computation, if necessary, you can manually change the parameters or select for all from parameter registers by clicking on this button.

Material formats

A list of formats, which are available for the given material in the stock and which can be used in the calculation. If necessary, you can also add your custom formats here. All formats are automatically assigned serial numbers and can be edited (in the case of stock formats, it is possible, however, to change only their quantities and serial numbers) or you can define faulty pieces.

There can be symbols in the table that idetify following :

  Formats that are available on stock

  Whole formats

  Cut offs

  Formats that have at least one defected unit/piece

  Formats longer (wider) than set maximum cut length

  Formats that can be used in the computation

Computation

You can start the computation by clicking the "Computation" button. After clicking the button, a window appears that contains indicators of progress of current format optimization as well as of the overall optimization together with a rough estimate of time remaining until the end of computation. The speed of the computation can be affected by a scroll bar even during carrying out the computation.

* The quality of computation is inversely proportional to its speed, but it may not always apply. Optimization is carried out continuously and it is possible that even if the program succeeded in "pressing" some components into the first formats, optimization of remaining components might not be so successful, making total exploitation even slightly worse than it could be in the case of faster (lower quality) computation. If necessary, you can therefore run the computation several times with different settings and choose the outcome that suits you best.

Products

Products manufactured in a series (or at least more than once) do not need to be manually entered into jobs. You can record them in this module and, if needed, easily add them to jobs from the module. In addition to this time saving, the module offers additional added value - automatic conversion of dimensions of all parts needed when changing the dimensions of the product, when changing the thickness of the material, etc. Each product can contain any number of parameters of multiple types (dimensions, quantities, materials used), and these parameters can be linked when selecting material, entering quantities or dimensions of each item.

Price of each product can be entered manually or you can allow its automatic calculation. In such a case, the price shall be calculated using the prices and quantities of the individual items. In the program settings, you can specify whether to calculate the price using the purchase prices of its components, or using their stock prices increased by a specified margin. All prices are specified exclusive of VAT.

Groups

Products can be classified into user-defined groups. If the selection "All Groups" is confirmed the table will display products from all groups simultaneously, otherwise only the current group of products will be displayed. The group name can consist of up to 60 characters. If you enter a "shortcut" (maximum of 5 characters) for the group, it will be inserted to the beginning of the code that is automatically pre-defined for each new product.
It is possible to create groups in more than one level, more information about it can be found in the section "Tree structure".

Re-computation of the prices of all products

Use this function if you change the price or weight of any material used (stock item) and you want to recalculate prices of all products.

Adding of the product into other product

If you enter a larger number of products that contain a certain repetitive element (e.g. door), you can define this element as a separate "product" and then add it to other products using this function. In this way you can save a lot of time.

After clicking this button a window appears, in which you can select a product, in which you want to add parameters and parts of the current product. To avoid undesirable collision, the table indicates (using an icon in the last column) all parameters whose code matches the code of the other parameter in the target product (its name is listed in the drop-down menu below the table and, if necessary, you can change it by selecting/entering another code and clicking the "Change code" button).
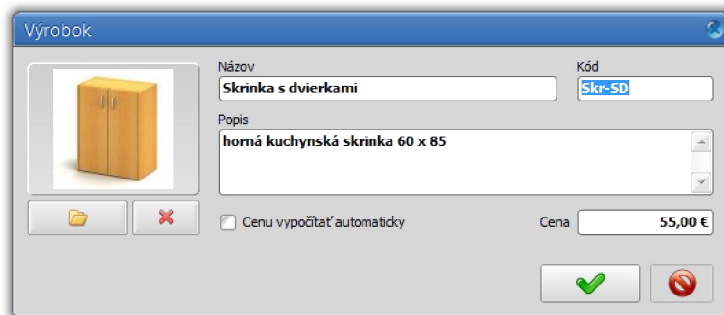
Add product to job

Clicking this button a window opens where you can select a custom product for which you want to add.

The table shows all the parameters of the selected product. If necessary, you can change any of them by entering another value (size, quantity, material...) in the right bottom corner, below the table. This change is temporary and applies only to the product that has just been added to the order (values of parameters entered in the product records remain unaffected). Parameters will be initialized after each change of the selected product, thus you should modify them only after selecting a product (step 1)! Optionally, the list of these parameters with default values can be automatically inserted in the product description, and/or you can change its code, name and number of pieces in an order.
In this way, products can be added in an order directly as well, using the "Orders" module (in such a case, however, it is not possible to select a different order, you can add products only to the current order).

Product

Parameter

Product name - max. 60 characters

Code

Unique information that distinctly identifies a product by data import and export. Its max. length is 25 characters. In case it is not yet set, program will automatically re-define in the format "Shortcut of the group – Initial letters and numbers product name ".

Description

Product description - a multi-line text

Image

A product can be assigned an image by selecting it from the image register.

Automatic price calculation

If you confirm this option, the program will automatically calculate the price of the product after each change in the list of items (based on their quantities and prices of materials used).

In the program settings, you can specify whether to calculate the price using the purchase prices of its components, or using their stock prices increased by a specified margin. If you uncheck this option, the program will allow you to enter the price manually. Products that have this selection confirmed are identified in a table by a icon.

Price

Manually entered price of the product (it is available only if you do not want the price to be calculated automatically)

Product Parameter
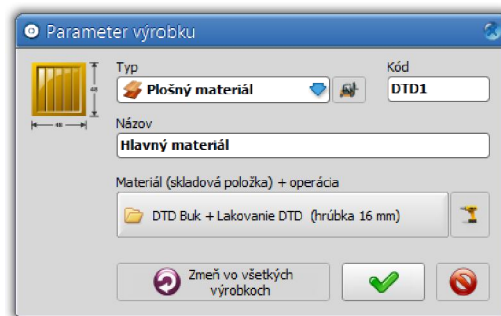
Type

Parameter can be one of the 7 types:

- *Size*
  It is used for parameters defining product dimensions (e.g. width, height, depth, length, width of module A, height of module B ....)

- *Quantity / number*
  It is used for parameters defining specific quantities (e.g. number of shelves, number of cabinets ....)

- *Panel material*

- *Bar material*

- *Edging strips*

- *Other material*

- *Operations or services*

Code

Unique code of parameter, max. 10 characters.

Parameter

Name of parameter, max. 30 characters

Size

A dimension is to be entered, if a "Dimension" type parameter is selected.

Quantity / number

It is to be entered if a "Number" type parameter is selected.

Stock item

Stock item can be selected if the selected parameter is of another type (material/operation). You can also select operation separately by clicking on the small button in the right.

Change in all products

Click this button if you need to change the parameter value with the given code in all displayed products (in a table in the "Products" module).
ATTENTION! The function is irreversible and therefore you have to carefully check first whether you have actually filtered only the products, which should be affected!

Product item

Material

Material can be selected from product parameters or directly from a stock. Depending on the selected item, you can specify other parameters – dimensions and edging strips in the case of panel materials, length in the case of bar materials.

Quantity

The quantity (number of pieces) of a selected item. The unit of measurement cannot be changed - a measurement unit of a selected stock item (parameter) is used. Panel and bar materials represent an exception - their quantity is always specified in the number of pieces. If at least one parameter of "Number" type is specified for this product, a button is shown here that allows creating a formula for automatic calculation of the amount. If not, you can enter the amount directly.

Length

Length can only be entered for panel and bar materials. For more information on length units, see chapter "Entering dimensions". A panel or bar component may also include more lengths - this can be used if the material has grain, which should optically continue on individual components (for example, in the case of drawer fronts, cabinet doors, etc.). You can add another dimension to an item by pressing the button. If a component contains more dimensions, a control element with the number of the actual dimension displayed above the button. You can use this element to switch between individual dimensions (you can also move to a next or previous dimension by pressing the PageUp and PageDown buttons, respectively). If you reset any length, it will automatically be deleted at saving. The length of an item cannot be directly entered in this window. It can only be entered through the window in which you can create a formula formula for automatic calculation of dimension. The window appears after clicking the button.

Width

Width can be only specified for panel materials (the width of bar materials is specified in a stock and displayed here only for information purposes). Other steps are similar to the specification of length(s). You can add more widths by pressing the button.

Follow a grain

This option is available only for panel components that do not include more lengths or widths. Confirmation of the option means that if a material has an oriented grain (this is defined in a stock item), a component may not be turned (width may not be changed to length and vice verse) when being saved in a cutting plan. This is used for the components that will be visible in a product, if changed orientation of their grain would cause an aesthetic defect. Components that have this choice confirmed are identified in the table of items by a icon.

Rotate the part

When you click this button, the dimensions and edging strips will be rotated in relation to the material drawing.

Code

Item identification code - max. 25 characters

Parameter

Item name - max. 60 characters

Description

Description of item - multi-line text

Edging strips

This tab is only available for panel components. It allows you to assign edging strips (individually for each edge). Click on the corresponding button to select the desired strip from a stock. After selecting the strip, its thickness (as specified in a stock) is displayed in the edit field (to the right of the button). The program then automatically reduces the dimensions of a component on the cutting plan by the thickness (modified dimension is shown under image of the component for information). This ensures that the finished component with stuck-on strip will have the desired dimensions. If necessary, you can also edit offered thicknesses of strips.
At the same time you can also enter a dimension here which will be automatically added to the edge of a panel component containing an edging strip (it is necessary if you need to grind off an edge by the dimension even before the strip is applied to the edge).
If option "Do not adjust part dimensions" is confirmed, the part will have in cutting plan dimensions as set (that means the parts will be not decreased by the edge strip thickness or differently adjusted).

Accesory

In this tab, you can assign two independent attachements to the part, enter the number of package (where the part would be packed) and determine whether the attachement would be packed together with the part or in a separate package.

Others

In this tab, you can assign another picture - its drawing - to the part, if necessary.

Formula for Calculation of Quantity

In this window you can create a formula (rule) for automatic calculation of quantity.
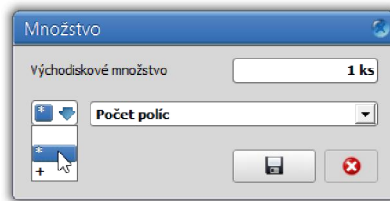
After entering the starting quantity you can determine the resulting quantity by selecting one of following three options:

1. The resulting quantity is the same as the specified starting quantity.
2. The resulting quantity will be calculated as a product of the specified quantity and the value of the selected quantitative parameter
3. The resulting quantity will be calculated as a sum of the specified quantity and the value of the selected quantitative parameter

Example:

We have entered a parameter "Number of shelves," whose value is 3. We need to place 4 pins under each shelf, which means that we enter the quantity of pins as 4 * Number of shelves. In this example, the program automatically calculates that the required number of pins is equal to 12.

Formula for Calculation of Dimension

In this window, you can create a formula (rule) for the automatic calculation of dimension. The resulting dimension is calculated from the initial dimension and max. five additional mathematical operations and other dimensions.
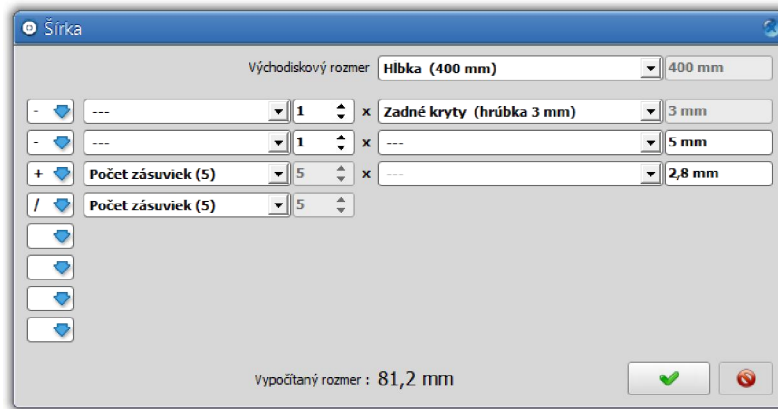
Each of the dimensions can be defined as follows:

- *By direct specification*
  if no parameter is selected in ComboBox ("---" is shown), an edit field for manual specification of a dimension is enabled (the field is located to the right of the ComboBox). If you want to enter the dimension directly and a parameter has already been selected in the ComboBox, you can quickly cancel the selection by pressing the Delete key

- *By selection of a "Dimension" type parameter*
  in this case, the dimension will be determined from the selected parameter

- *By selection of "Panel materials", "Bar materials" or "Edging strip" type parameters*
  in these cases, the dimension will be determined according to characteristics of a stock item selected for given parameter. In the case of bar materials, it will be its width, in other cases its thickness.

To the initial dimension you can add maximum 8 basic mathematical operations (addition, subtraction, multiplication, division) with other dimensions. Sub-result is calculated after each operation and each successive mathematical operation always refers to the previous sub-result results. If you select addition or subtracting, you can enter (select) dimension and also its integer multiples (his direct typing or selecting a parameter of type "number"). If you multiply or divide, you can specify only a multiple or divisor.

Example:

We have a cabinet with one shelf with following parameters defined:
W - Overall width = 800 mm
H - Overall height = 600 mm
DTD - Main panel material = chipboard with thickness of 16 mm

We want to create a formula to calculate the length of the inner shelf. We can calculate the length if we subtract twice the thickness of the side walls and 1 mm clearance (the shelf is to be removable) from the total width (800 mm). In this case, the formula will look as follows:
Initial dimension: overall width = 800 mm
The first operation: Subtracting twice the thickness of the material used, i.e. 2 x DTD
The second operation: Subtraction of 1 mm clearance
Thus, W (800 mm)
- 2 x DTD (-2x16 mm = -32 mm)
- 1 x 1 mm (-1 mm)
The result is 767 mm.

This will ensure that the dimension of the shelf will automatically be calculated correctly after each change of used material (or its thickness), as well as after any change in the overall width of the product.

Stock

The module "Stock" is designed to record and track amounts of materials and goods and the status of services.

Groups

Stock items can be divided into user-defined groups. If the selection "All Groups" is confirmed the table will display stock items from all groups simultaneously, otherwise only the current group of stock items will be displayed. The group name can consist of up to 60 characters. If you specify for the respective group a "shortcut" (max. 5 characters), it will be inserted at the beginning of the code that is automatically pre-defined for each new stock item. Store items can be assigned to stock groups (they are recorded in tree structure).

One of five basic types is also defined for each group:

Panel material
This type represents individual pieces of panel material unit. A fixed surface measurement unit is assigned to the item (however, you can change the unit in the program settings even before entering the first stock items of this type). Moreover, you can also enter other parameters such as thickness, presence of oriented grain or predefined cutting parameter.

Bar material
Like the previous type, however, only the length is monitored in formats. The fixed unit of measure is length (m, ft...)

Edging strips
Like the previous type, however, only the length is monitored in formats. The fixed unit of measure is length (m, ft...)

Other materials and goods
Other items; you can enter any unit of measurement

Services and operations
Virtual stock items representing a service or operation. They are recorded in the store only for their clear use in documents, jobs, and products. Since the item is intangible, quantification of a "stock" is unnecessary in this case. Nevertheless, these items also have their stock card where you can clearly track a document or job in which the service or operation was used.

This type can be changed only if the group does not contain stock items or other subgroups or upgroups.
 A group can only be deleted if it contains no stock item and it can be transferred to other groups of the respective type.

Stock items

The table below shows the stock items of the current stock group. If the selection "All groups" is confirmed the table will show all registered stock items.
Beside other basic data, these symbols are displayed:

⚠ *if current reserve is less than minimum quantity (it is possible to enter it individually for each stock item)*

▤ *if panel material with oriented grain is used*

A stock item can be deleted only if it has not been used in any contract, document or cutting plan.

Formats

If the current panel part is already placed in a cutting plan, you can find and display such a plan easily by clicking on this button. Otherwise it will be added to the cutting plan with the other panel parts made of the same material (even from more orders at the same time, if necessary).

Data for each format (with the exception of the selling price) can be changed only if the respective format has been used neither in a cutting plan, nor in any documents.

✖ Defected pieces

In case that you need you can for each format edit also its defected units in the separate window.

▦ Revenue and Expenses

Display records of receipts and issuances of the current stock item. Records are available for all stock items with the exception of panel-based and length-based material (these are recorded for each format separately).

⚙ Other functions

Other functions available in Menu – Stock item:

Components
A list of components (other stock items) that is make up the current stock item. Panel and bar materials may not include components (they may not consist of other items).

Combine
Using this feature you can combine (receive to a store) the required quantity of current stock items and, at the same time, stock out its components.

Bulk change of prices/taxes
With this function you can change to selected stock items their prices or taxes all at once

Recount stock
Recount of reserves and values of all stock items. This function can be used in case of unexpected power cut off or any computer break down

Stock item

Parameter

Name of stock item, max. 60 characters

Code

Unique information that uniquely identifies a stock item at data import and export. Its max. length is 25 characters. The code will be automatically predefined in the form "Abbreviation of stock group - Initial letters and digits of item's name".

Unit of measurement

Max. 6 characters. Unit of measurement can be only specified for other materials/goods and operations/services.

Only integer numbers

Confirm this option if the quantity of a stock item may not be expressed by a decimal number (e.g. piece items, packed items, and so on.).

Description

Description of item - multi-line text

Barcode

Max. 20 characters. This information will be used for printing a bar code for a specific item. If an item has this barcode specified, the Code128 type barcode will be also displayed in a window above the table.

Stock price

Unit stock price without tax. If the item already contains at least one receipt, stock price is calculated automatically and it is not possible to edit it manually.

Selling price

Here you can enter a unit selling price without tax

Taxes

Rates and types of individual taxes can be selected from the tax register. When creating new stock item here are automatically given predefined tax rates from the program settings.

Minimum stock

Here you can specify the minimum stock of a stock item in the store. If current stocks in the store fall below this value, the item will be indicated by an icon in the last column of a table.

Image

You can assign an image (in JPG format) to a stock item. In addition to the store, the image will also be displayed in other modules where the given stock item is used. Only a thumbnail image is saved in a database; a full-size image is always downloaded from a file. You should therefore arrange for all images to be always available - the best method is to allocate one folder for this purpose and copy the images (*. jpg files) into the folder.

Over-consumption

In there is an item whose processing (e.g. cutting, gluing, grinding, painting, etc..) creates waste, you can specify the value of the waste as over-consumption. It is a percentage value (at the most 320%, with a precision of 2 decimal places), by which consumption of the given stock item will be increased at job calculation.
In case of edging strips, the over-consumption can be entered also as length, by which the consumption of strip for each edge will be automatically increased. Over-consumption specified as a length will have priority over the over-consumption specified as a percentage.

Colour

If you select a colour for an item, the symbol of a rectangle coloured in with a given colour is shown in the table. You can use the feature to visually distinguish certain items in the table, thus accelerating their visual searching. If you assign a colour to an edging strip, the strip in this colour will be also optionally displayed on cutting plans , further contributing to its faster identification.

Weight

Unit weight of an item. Based on the value, the weight of the products is calculated in a job calculation. Unit of measurement can be selected in the program settings.

Thickness (width)

Here you can enter the thickness of the panel material and edging strips and for bar materials their width. You can edit the thickness of the edging strip only if it was not used in any other product. This parameter is used by automatic computation of component dimensions and by computation of cutting plans.

Oriented grain

This option is only available for panel materials. When confirmed, it indicates that the material has oriented grain in the direction of some dimensions (e.g. wood). A grain which, when turned by 90 degrees would cause a visual defect to a final product, is considered oriented.

Cutting parameters

This option is only available for panel and bar materials. Here you can predefine the starting method of cutting/shearing (sellecting from paramater records), which will be automatically selected before starting the computation of the cutting plan for the material.

Initial quantity, initial price

In case that the stock item does not yet contains any moves you can enter initial balance. It is valid for all for all types with exception of service, plan and bar material. For these the initial balance is entered for each format.

Internal Note

Internal multi-line comment.

Supplier

If necessary, you can specify a supplier by selecting it from business partner records.

Note displayed at selection

Here you can enter text which automatically appears in the form of a note on each selection of the given stock item into a document, job or product.

Item active

Stock item that has been already used, cannot be deleted, but it can be marked as "inactive" using this option (it will be displayed in the table in gray colour and crossed out). Inactive items will not be transferred to a new database or (if you use the "Database – Transfer to a new database" function).

Note:

The type of a stock item may not be changed; it is automatically derived from the stock group, type to which the item is assigned.

Formats/Variants

Initial amount

Initial stock balance of the formats in units. It is possible to change it only to first used format.

Length

Format dimensions

Cut off

Confirm this option if it is cut off. Otherwise the format will be considered as complete.

Use is in the cutting plan

Confirm this option if you want to use this format by the computation of the cutting plan.

Unlimited stock balance

In a cutting plan, only formats with non-zero stock level can be used. If you want to always use this format in calculations (regardless of its stock level), check this option.

Initial price

The initial stock price of 1 piece of the format. If the price is not specified, it will be automatically calculated from the stock price of the material and the format size. When you click the button with the calculator icon, a window appears in which you can easily and quickly calculate the price of the format using the price per 1 m2 (1 m) or 1 kg.

Selling price

selling price of 1 format unit. When specifying a format, its selling price is automatically calculated from its dimensions and from the selling price of the material per 1 m2 (for panel material) or 1 m (for bar material), but you can change it at any time.

Parameter

Optional parameter with a maximum length of 60 characters. Here you can enter any identifier according to your needs (e.g. a code denoting quality, location in the stock, etc.). This parameter is used when calculating the cutting plan – if the calculation results in the creation of new cut-offs, they will be put in the stock with the same parameters as are those of the format from which they were cut. If you specify for instance material quality, Optimik ensures that cut-offs cut from a first-quality format are received in the stock again as first-quality items.

Size

According to your direction you can assign letter A-D, which indicates the size, to the formats. The letter will help you to sort the formats and to search them more easily.

Note

Arbitrary multi-line text

Defect's pieces

Defining defects makes sense only when a format is used in a cutting plans, where computation places components in a given formats in such a way as to "bypass" all defects. Defect's pieces of current format are defined in a separate window as rectangular areas with a specified position and size. If a defected piece is used in cutting plan, it is automatically removed from this list (when cutting plan is cancelled it will be returned here automatically).
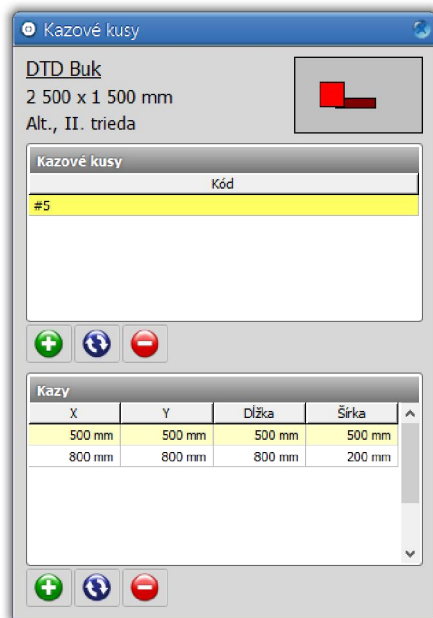
The following four parameters are specified for each area:

- X - distance of the left side of the area from the left side of format
- Y - distance of the upper side of the area from the upper side of format
- Length - length of the area
- Width - width of the area

Defect

If a defect has an irregular shape, define it by several overlapping areas:
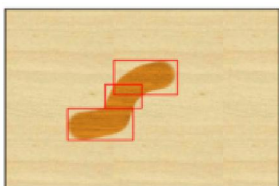
If you need to make the best use of this format in cutting plan computation, define the defect using higher number of areas:
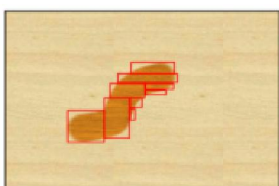
Receipts and Delivery

This window shows an overview of all issues and receipts for the current stock item along with the respective prices. The upper section of the window shows the total of individual movements and calculated total stock. A stock card is only available to authorized user.

Movements (receipts and issues) cannot be entered into records directly, but only:

- *through documents*
- *when issuing stocks for a job*
- *by creating issue card for the cutting plan*
  (issue of the formats used and return of cut offs)
- *by completing a stock item*
  (issue of its components and receipt of the complete item)

The Description column can also show one of the following symbols:

Job
for issue card, by which material was issued from stock for a job (other than panel and bar materials)

Cutting plan
for issue card, by which formats were issued from stock and cut offs from the cutting plan were returned to stock

Combined item
for issue card by which components were issued from stock and a completed item was received to stock

Stock price

Stock price of each stock item (or its format) is automatically calculated using the FIFO method (First In - First Out). It is assumed that items are issued from stock in the same order in which they were received into the stock. Price of the current inventory is thus calculated from the last purchase(s) and from the value of the initial stock.

Example:
There are 20 pcs of the XY item in the stock. The latest purchase was 14 pieces for € 3.70 and the previous purchase was 50 pieces for € 3.95. As there are 20 items on stock, it is assumed that 14 pieces belong to the last purchase (for € 3.70) and the remaining 6 pieces to the previous purchase (for € 3.95). The value of this stock is therefore (14 x 3.70) + (6 x 3.95) = € 75.50, and the stock price is € 3.775 (75.50/20).

Combined Items

If necessary, you can consider a stock item (except for panel and bar materials) as combined, i.e. as an item that is composed of (completed from) other stock items (components). These components and their quantities required for composition (completion) of one stock item can be specified in a separate window (you can display the window in Stock by clicking into Menu-Stock Item-Components). The combined stock items can, for example, include various packs, campaign packages, mounting kits and so on.
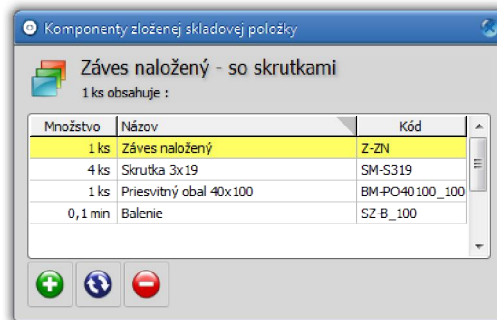
If you do not receive these items into the store in a completed condition, only completed before their issue, a separate function (Store-Menu-Stock item-Combine) needs to be used for this purpose.
Upon entering required number of combined items, program will create issue card through which it delivers out of stock necessary quantities of all components and receives required amount of combined items.

Example:

Item "Hinge XY - mounting kit", which includes the following components, is located in a store:
Hinge XY - 1 pcs
Screw - 2 pieces
Manual - 1 pcs
Package - 1 piece
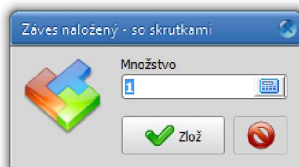
After running function " Combine" and entering quantity (e.g. 50 pc) the issue card with this items will be created :

Issue from the "Material store":
Hinge XY - 50 pcs
Screw - 100 pieces
Manual - 50 pcs
Package - 50 pieces

Receipt to "Main store":
Hinge XY – mounting kit - 50 pcs

Bulk change of prices/taxes
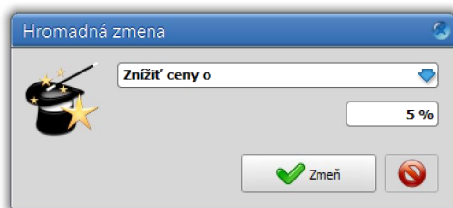
With this function you can change selling price or tax for all selected stock items at once (that means to these which are currently displayed in the table). In the separate window you can select one of the following actions:

1. Increase price

   prices of the selected stock items will be increased by given % while rounded (adjusted) according to parameters set in the program settings

2. Decrease price

   prices of the selected stock items will be decreased by given % while rounded (adjusted) according to parameters in the program settings program settings

3. Adjust tax (1-3)

   to selected stock items you can change tax rate (maximum 3 types of tax) or cancel it

Documents

The "Documents" module is intended for recording different document types ((invoices, receipt cards, issue cards, delivery notes, user-defined types) through which it is possible to change stocks in stock. Each document contains basic information , a list of items and price summary. The records are only available to authorized users.

Document type

The program contains several predefined types of documents. If needed, you can edit parameters of those types or create new types of documents according to your own requirements. A currently selected type can be changed in the ComboBox in the upper left corner of the main window.

Documents

Table with a list of documents. You can sort it by any column or filter by date, business partner, company, specifications or document status. The last column of the table shows the symbol indicating the current status of the document (statuses and their symbols can be predefined according to your needs for each type of document separately). Double click to change the document status or to add a comment.

The Description column can also show one of the following symbols:

🔷 *Combined item*
for issue card by which components were issued from stock and a completed item was received to stock

🏠 *Job*
for issue card, by which material was issued from stock for a job (other than panel and bar materials)

▦ *Cutting plan*
for issue card, by which formats were issued from stock and cut offs from the cutting plan were returned to stock

Document items

You can enter an unlimited number of items in the document – manually, by a selection from the product range, or by a combination of these two methods. If the item has an impact on stock level, the table next to its name shows the symbol:

- if it is an issue from stock
- if it is a receipt to stock

Price summary

After any change in the document items, the total amount of the document will be automatically calculated, together with all taxes and the total amount including tax (taxes) and these amounts will be shown here. These records can neither be edited nor deleted. If necessary, however, you can add to the table any "correction" amount (which may be also negative), along with its description (max. 60 characters, it is possible to predefine it in the document type setting). This amount will be automatically included in the total document amount - e.g. a negative amount for received advances, etc. ..

- if it is an issue from stock
- if it is a receipt to stock

Document type

Document name

The exact name of a document - max. 40 characters (e.g. "Invoice", "Delivery note", etc.)

Dates

Each document can contain three different dates. Here you can enter their names (e.g. "Issue date", "Due Date" and so on.). You can also specify a number of days for the second date and the third date. This number is used at creation of a document for their automatic calculation (by adding the specified number of days to the first date).

Business Partner

Description of a business partner, for whom the document is intended (e.g. "Purchaser" "Customer", "Supplier").In the case that a certain document type will be repeatedly created for one business partner, you can also predefine the respective business partner.

Supplementary information no. 1 and 2

Description of supplementary information (e.g. "Order Number", "Method of payment", etc.). Here you can also enter a list of specific data, which will later be offered at creation of a new document (in such a case, it will be possible to select the data instead of entering it manually).

Impact on stocks

Here you can choose whether the items pertaining to this type of document are to be stocked in, stocked out or have no impact on stocks.

Identification name

A name, under which the type will be identified in the selection ComboBox

Document status

Here, you can predefine according to your needs all the statuses applicable for the current document (e.g.: Unpaid/Paid, Received/Completed, ...). Each status can be also assigned a symbol that will identify it in the document table. By clicking on the buttons below the table, you can add another status to the list or edit the current status (CAUTION! - when editing, these statuses will be also changed in all corresponding documents)
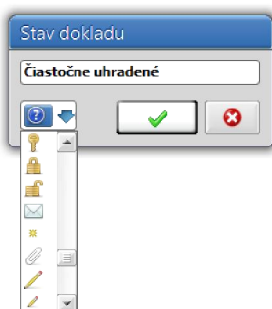
Signature

Description of our signature at the bottom section of a document (e.g. "Prepared by", "Supplier"...)

Signature (business partner)

Description of our signature at the bottom section of a document (e.g. "Prepared by", "Supplier"...)

Footnote

Text that will be automatically printed at the bottom section of each document of this type

Payment data:

Bank Account

Description of a bank account (e.g. "Bank", "Payments are to be sent to"...). You can also predefine the most frequently used account by its selection from the records of bank accounts..

Variable symbol

Description of variable symbol. If needed, here you can choose for the symbol to be automatically created in a document on the basis of the document number's digits or business partner's code.

Supplementary information no. 1 and 2

Descriptions and variants of supplementary information (e.g. Specific symbol ","Method of payment "...)

Correction amount

The specified description is automatically set when the amount is added to the price summary of a document.

Total amount

Name of the total amount of a document (e.g. "Total", "To be paid", etc.).

Note:

After creating the first document of the given type, you can edit neither the name of the document nor its impact on stocks.

Document

Dates

Dates according to the setting in document type. If you change the date of issue in a document (date no. 1 - all items of the document are recorded in a store with the given date), then it will be checked at document saving whether the change of data does not cause a negative balance in the stock cards (e.g. if, due to the change of date, an item would be stocked out before it was stocked in). However, the check is only performed if negative balances of stock items are prohibited in the program settings.

Number

Serial number of a document. It is automatically created based on the serial numbers of the last two documents (the first two documents must be numbered manually). Number can be edited, the program, however, does not allow creating two documents of the same type with identical numbers. Documents can be sorted according to their numbers, but only in alphabetical order. If you need correct sorting results, use leading zeros in the numbers (not Fa-1, Fa-2 .... Fa-9999, but Fa-0001, Fa-0002 .... Fa-9999).

Currency

Document currency. An initial currency is chosen automatically, but you can select any other currency from currency records. If you choose another currency, you will also need to enter its current exchange rate (by default, a rate specified in the currency records is offered by the program).

Business Partner

Selection of business partner's address from Addresses.

Description of a document

This description will be displayed in a table with documents.

Other data

Other data according to the setting in document type.

Bank Account

You can choose a bank account from the records of bank accounts

Payment data

Variable symbol and two additional data according to the settings of the given document type.

Specification

You can also assign specification to a document by sellecting from the list of specifications. Documents can be filtered according to the specification.

Text

Text of a document – it will be placed above the table with items.

Final text

Text to be placed under the table with items.

Round off resulting amount

Here, you can accurately set a method of rounding off the resulting amount.
First enter a multiple to which you want to round off an amount (e.g. 1 for rounding off to the nearest whole number, 0.01 for rounding off to hundredths/cents and so on), and then choose how you want to round off the amount (down, up or mathematically).

Document status

If there are statuses specified for the given document type, you can set or change the status of the current document.

Internal Note

This note will be not listed on the printed document, but will be available for your reference and displayed in the bottom part under the item table.

Document Item

Stock item

Selection of items from stock. The code, name, description, unit of measure, price and tax (taxes) will be taken from a store along with the item. In addition to this, a discount can be automatically set for the business partner for whom this document is issued. Discount will be shown separately or it can be included directly in the price (this can be set individually for each business partner).

If you select a stock item and the current document has an impact on stock levels, receipt or issue will be automatically created and the stock levels will be subsequently updated.

Number

Serial number of a movement in a document. The program automatically assigns this number, but you can change it. In such a case, all the items concerned will be automatically renumbered.

Code

Item Code

Parameter

Item Name

Description

Description of item

Quantity

Item quantity. In case that the stock item is selected and can use whole number values, it will be not possible to enter quantity in decimal number.

Unit of measurement

Unit of measurement can be entered manually only if no stock item is selected. Otherwise it will be defined according to the selected stock item.

Returned

This option is available only if stock item is selected and also current document has impact on the stock reserve. If you confirm this option, impact on the stock reserve will change – this way you can in receipt card also issue stock items or vice versa – in issue card or invoice receive stock items. Value of such item at the same time decreases final document price. This option is used e.g. by issue card for cutting plans when usable cut offs are returned to stock.

Unit Price

Price per unit of measurement in actual currency of a document. The price cannot be specified with a higher number of decimal places than you set up in a document. In the case of stock items, a price is determined automatically (retail or wholesale prices, according to a business partner assigned to the document), but you can change it. If you enter the format price of the bar or panel material, you can use price calculator, which automatically computes the price of the given format from the entered price per 1m2/1m.

Including tax

Confirm this option if the entered unit price already includes tax (taxes).In such case the tax (taxes) will be computed as a difference between price with tax and price without tax (tax base). You can apply if you want keep the price with tax. Example: item with a price of 1,23 € with tax (20%). Price without tax (tax base) is then 1,03 €. Tax computed from the tax base would be 0,21 €, and consequently the price with tax would be 1,24 € . But, if you confirm this option the tax will be computed as follows: 1,23-1,03 = 0,2 € therefore final price with the tax will fulfilled.

Additional discount

Discount in % - with a precision of up to 2 decimal places. If you enter a negative number, the value will be considered as a surcharge. The amount of discount may range from -300.00% to 100%.

Tax (taxes)

In the bottom right section, total price is automatically calculated from the data entered (excluding tax and including tax) as well as the amount of tax/taxes. Rates and types of taxes can be selected from the tax records.

Do not record to stock

This button is available only for document items, which have impact on the stock reserves. By clicking on it you can determine that this item will have no effect on stock levels.

Business partners

Address records and other data/information about business partners.

Groups

Business partners can be classified into user-defined groups. If the selection "All Groups" is confirmed the table will display business partners from all groups simultaneously, otherwise only the current group of business partners will be displayed. The group name can consist of up to 60 characters.

The groups can be created in more than one levels, more information can be found in the section "Tree structure".

Business partners

Table with a list of business partners. You can sort it by any column or filter by state/town in the address or by delivery address, specifications or company. Detailed information for the current business partner is displayed above the table.

Clone record

Use data cloning to simply create a new record from a copy of the current record. This can be particularly useful when the business partner changed the address or identifying data. In such a case, do not edit the original entry (changes would also be reflected in all documents and jobs, where the respective record has been used!), but create a new record using this function. If your business partner has been assigned no company, it can be optionally created by the program (it will be identical with the name of the business partner being copied) and it will be assigned both to the original and the new record. In this way, a linkage between the two records will be created, by which you can filter documents and jobs. After saving the new record, do not forget to mark the original record as inactive.

Business Partner

Number

Unique information that distinctly identifies a business partner at data import and export. Its max. length is 20 characters. In case that the number is not yet entered, program will automatically predefine it according to initial letters and numbers of the name.

Active

Business partner, for whom at least one document or payment was issued or made, cannot be deleted, it can only be set as "inactive" (it will be displayed in the table in gray colour and crossed out). Inactive records will not be transferred to a new database (if you use the "Database - transfer to a new database" function).

Address

A complete address consists of an entered name and street (both data can be also entered into several lines) and selected city and country from respective records. If you cancel the option the "Delivery address is the same", the program allows you to enter a delivery address as well.

Other delivery address

Accept this option if the business partner has different delivery (mailing) address. In such a case, a field for entering the respective data will appear.

Contact data

Contact person name, phone number, e-mail address and homepage URL.

Note

Internal comment (it will be displayed under the table of business partners).

Identification information

Three pieces of identification data, dependent on the selected country (descriptions of the data can be entered for each country separately). You can use them to enter tax registration numbers and so on.

Specifications

Each address can have up to 3 specifications assigned, according to which the business partners can be sorted very specifically.

Tax

Here you can confirm or prohibit the application of a specified tax type (taxes) in a document for a specific business partner. A specific tax rate is entered in a stock item, basic types of taxes (max. 3 types) are defined in the program settings.

Company

If necessary, you can assign a business partner to the selected company (by this manner you can create a "link" between multiple business partners).

Additional discount

If you enter an additional discount it will be automatically offered at the creation of a document or job for a specific business partner. Discount may range from -300.00% - 100% (a negative number will be considered as a surcharge).

Include discount directly into the price of document item

If you confirm this option, the discount in document item will be included directly in the price (item price will be automatically reduced by discount during its selection in stock). Otherwise, the discount appears in document item separately (as percentage value).

Note displayed at selection

Here, you can enter a text which automatically appears in the form of a note at each selection of the given address into a document or job.

Others

Through this panel you can access settings and other parts of the program. For more information, see the following chapters.
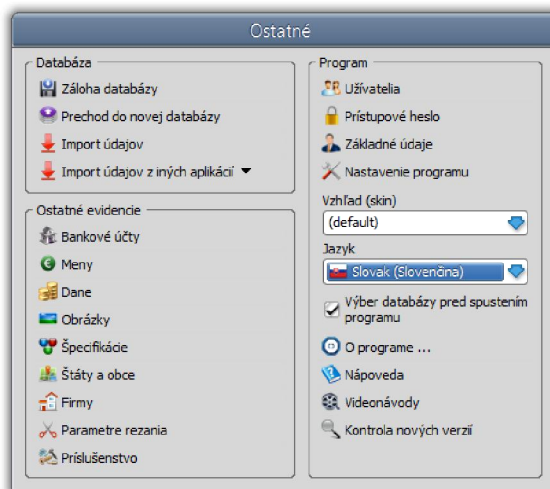
Database

Database Backup

Database backup is an important process that enables the creation of complete backup of the actual database in case of its possible loss or damage which may occur for various reasons (computer failure, virus, loss or theft of a computer, natural disaster, etc.). Verification and optimization of database data as well as the removal of unnecessary lines and other "junk" from a database is performed together with database backup. The database backup process can also be carried out under full operation, which means that individual users do not need to be disconnected. Since the value of data you enter into the program will often exceed the value of the program itself over a time, please do not underestimate the necessity of regular backups, thus avoiding inconvenience and potential losses.

You can run the backup process by clicking into Menu-Service-Database backup. Subsequently, a standard dialog box appears with a request for entering a backup file name and location. To speed up and simplify the process, the name is predefined in the form OPTIMIK_yymmdd.optbc (where yymmdd is the current date), and OPTIMIK/Backup target folder, located in same folder as configuration file "setup.ini", is selected. To automate this process, you can enable automatic backup (or choose a different folder for backup) in the program settings.
Database restoration (the opposite to backup) can be only carried out in start up window.

Important warning:
Do not perform backup manually by using a simple copy of the database file, because such a process does not perform the above-mentioned data verification and optimization, and should another user work with the database in the time of such "backup", the created copy of the database shall almost certainly be damaged.
For security reasons it is not possible to back up or restore a database in client installations of the program (only in OPTIMIK program installed on a server or using a local database).

Transfer into new database

Use this function to create a new database and also to transfer all auxiliary records and settings in it. In addition, the list of products, operations, business partners, stock items and formats, including the respective stock levels, will be also transferred to the new database. Stock items will have automatically set initial stock price as well as the value of the current stock and the values for the current database. All records concerning stock items and business partners that are marked as "inactive" and that are not used in other transferred records will be omitted.

Data Import

Data Import into the program from the text file. Detailed description can be found in next chapter "Data import and export"

Program

Users

In this window it is possible to register all program users, including their contact information, image, signature/stamp (used when printing documents) and authorizations. Only the administrator (i.e. the user who is first registered in the program – marked in red) has access to these records. The administrator can thus edit the list of users, set up their authorization or cancel their pasword (no option but to change them). The symbol is shown in the table beside thename of the user with a specified login password.User, who has created or edited at least one document in the program, cannot be deleted, only deactivated (inactive user shall be shown crossed out in the table).
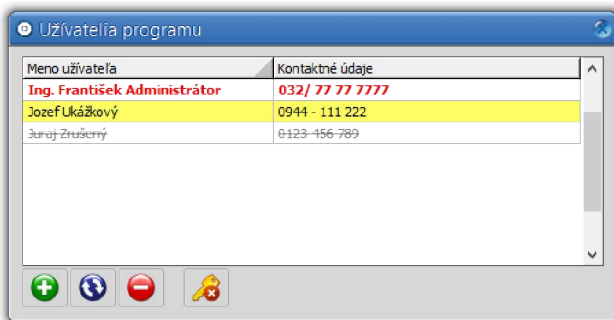
Administrator can assign authorization to any user (except yourself because it has already all authorization) for individual operations with data and for the access to selected program parts.

If the records contain at least one other user in addition to the administrator (or if the administrator has a password assigned), the login window will automatically appear at program startup.

Loginng password

A password is set up by each logged user individually - by clicking into Menu-Settings-Password. He must enter his original password and then enter a new password twice (to avoid a possible error at entering) in the window that subsequently appears. If a user forgets the password, he can ask the administrator to delete the password and then enter a new password (a forgotten password cannot be ascertained afterwards). However, in the case of the administrator´s password this is not possible! - Other users may not delete any password; they can only change their own passwords.

Basic informations

By clicking this button, you can change your basic data – name, address, logo, contact details and other data (e.g. the information on the registration of your business in the Small-Trade Register or Commercial Register, etc.). These data will be used when printing documents and reports. Abbreviations of identification data (company registration number, VAT number...) depend on the country in which your company is located and, if necessary, you can change them in the "Countries and Cities" records.

Program settings

Detailed description can be found in next chapter.

View (skin)

You can select here the interface of the program that you like the most :)

Language

In the pop up menu you can select language in which Optimik will further operate.

Additional thickness before running the program

You can check this option if you want to display a window with the data for logging in to the database every time you start the program. This can be useful if you work with multiple databases and need to switch between them frequently. If this option is not checked, the initial window appears only when there is a problem with automatic direct connection to the database. This option is a part of the program configuration.

Program Settings

In this window you can perform any change of the program parameters. This setting is individual for each user and everyone can set the program in accordance with his/her needs and expectations.
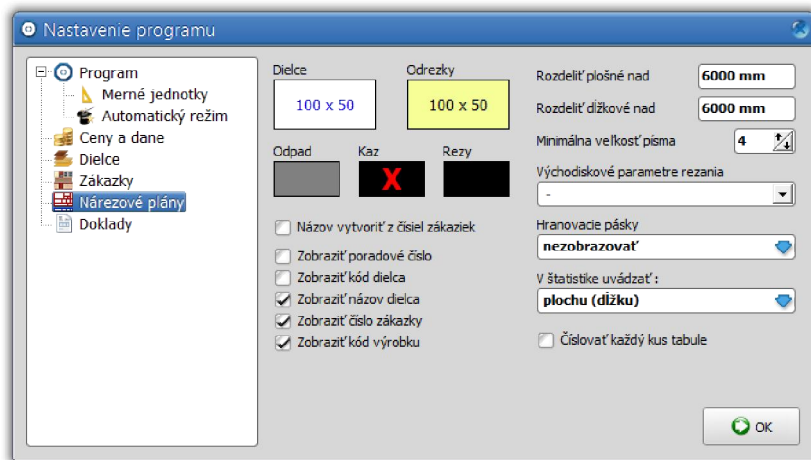
Program

Display of the tool menu

Here you can specify where you want to display the toolbar with buttons for opening the main modules in the main window. It can be displayed in the upper section, bottom section or in the header of the main window.

Backup database automatically

If you confirm this option, the program will every day, by the first program closure, automatically back up your database. To the name of the backup database date in the format YYMMDD will be added and the backup file will be saved in Backup folder (located in the folder with the current database). Backup can be run manually at any time. For more information about backup, see Backup database.

Folder for backup

If necessary, here you can also select a different folder into which database backup will save automatically.

Check new program versions

If you confirm this option program will check by every start up if there is a new program version. If there is, program offers the download.The function is possible to start also manually by clicking to Menu-Other-Check for Updates.

Scrolling in tables

Count of rows

Measure units

Area

Select a unit (m2, inch2 or ft2) that you want to use in the program for the designation and evaluation of the quantity of panel materials.

Length

Select a unit (m or ft in) that you want to use in the program for the designation and evaluation of the quantity of bar materials and edging strips.

Note:

Area and length units can be only edited if no stock item is specified in a store!

Weight

Select a unit (kg or lbs), you want to use for specification of weight of a stock item or evaluation of weight of job products. The unit can be also changed, if needed; weights will be recalculated automatically.

Volume

Chose unit (m3,in3 or ft3), which you can use optionally in statistics of the cutting plans for panel materials.

Dimensions of components
> Select a unit of length that you want to use most frequently when entering the dimensions of components.

Automatic mode

For more information, see the last chapter "Additional modules" ...

Prices and taxes

Adjustment of selling prices
> Since the range of selling prices can be very large, you can also set an individual way of rounding off for up to 5 price levels (for prices below $ 1, $ 10, $ 100, $ 1000 and above - the $ sign means initial currency). Hence, you can enter a multiple to which you want to round off an amount (e.g. 1 for rounding off to the nearest whole number, 0.01 for rounding off to hundredths/cents and so on), and then choose how you want to round off the amount (down, up or mathematically).

Initial tax rates
> You can select the most frequently used rate for each type of tax. The rate will be used as an initial rate at creation of a new stock item or document item.

When calculating product prices, use:
> Here, you can specify whether to calculate the product prices using the purchase prices of their components, or using their stock prices increased by a specified margin.

Parts

Order of entered information
> To speed up work with the program, you can select the order, in which you usually enter the length, width and number of components.

Do not adjust part dimensions
> If you confirm this option, each new component will be automatically set to prevent adjustments of its dimensions by the thickness of the strip specified and of its specified addition for machining.

Automatically continue in adding new records
> If you confirm this option, a window to add another new record will automatically display after saving a new component (stock item, dimension, ...) .

Display dimensions without length unit, Display number of pieces without text "pcs"
> Confirm these options, if you want to display number of pieces (quantities) and dimensions only by number itself

The allowance for edge trimming
> You can pre-define dimension that will automatically added to the edge of the panel of the panel part containing edging strips. This dimension will be automatically offered for each new part, but if necessary you can change for given part or enter it manually.

Group components when printing their list
> For a job or cutting plan, you can print a list of grouped components. Using this option, you can specify whether you want to group components of the same dimensions or those of the same dimensions and edging strips.

Jobs

Automatically open list of the jobs
> If you check this option, the Orders module will automatically display a list of orders when placing the mouse cursor on the top bar. Here you can enter the delay in milliseconds that will prevent an unintentional opening of the list when you just place your mouse cursor over the bar.

Normal time for completion of the job
> Enter here number of days that are normally needed for completing the job. This number is used for automatic computation of the deadline for completing the job during its record into the register. If you enter zero the deadline will be not followed.

Cutting Plans

Colours and fonts
> This block includes 5 rectangles that represent a part, cut-off, waste, fault and cut. By clicking on the area of any rectangle you can set the colour to be used when printing the respective element in a plan and by clicking on the text in the middle of the rectangle, you can set the font that will be used for printing dimensions and descriptions. In the case of a fault, you can set the colour of its strikethrough (by clicking on the "X" character).

Note:
Since in cutting plan formats with different dimensions may occur and it can be displayed and printed in different sizes, font size 10 is calculated as 2% from the displayed format length (in formats, whose length is smaller than the width it 3% of the width displayed).

Display component name, Display job number, Display product code, Display component code
Confirmation of these options will ensure that the corresponding data is displayed and printed in each component of a cutting plan (provided that the component is large enough to fit the data)

Allowed rotation of all parts on material without grain
If you confirm this option and material of the cutting plan does not have oriented grain (defined in stock item) and computing the cutting plan, rotation will be allowed also to parts which have this option prohibited.

Divide an excessive area
The area cutting plan for a format, with a side longer than a specified dimension will be automatically divided into several sections at computation.

Divide an excessive length
The linear cutting plan for formats, which is longer than a specified dimension, will be automatically divided into several sections at computation.

Minimum font size
When printing the cutting plans, component dimensions and other identifying information (name, code,..) is written into each component. In the case of smaller components, a font is automatically reduced so that the data can be written into the component. However, if components are too small, a reduced font would be so tiny that it would not be legible. Data which should be written by a font, whose size is smaller than the value specified here, will therefore neither be shown nor printed in a cutting plan.

Initial cutting parameters
You can set here initial group of parameters that will be predefined for each new cutting plan.

Edging strips
Here you can choose the thickness of the line, which will mark the edging strips on the cutting plan. The colour of the line does not have to be set, because it is automatically set in the colour of a particular edging strip (entered in the stock). If necessary, here you can disable display of the edging strips completely.

Indicate in the statistics
Select the variable to be indicated in statistics for cutting plans - area (length), volume (length) or weight.

Number each piece of panel
If you confirm this option, each piece of panel will be numbered (including those with identical layout - 1, 2, 3, 4, 5, 6 ...). Otherwise, only panels with different layout will be numbered and the number of repeated panels will be specified in parentheses after the number (e.g. 1(2x), 2, 3(2x), 4 ...)

Documents

To round off a final amount of documents
You can predefine a method of rounding off the final amount. This rounding off will automatically be offered at creation of a new document.

To automatically open a store at creation of a new document item
If you confirm this option, a window with a selection of the stock item will automatically open at creation of a new movement of the document.

Allow negative balances of stock items
If you confirm this option, the program will not monitor every entered movement with the aim of preventing the possible negative balance of a stock item.

Bank Accounts

List of your bank accounts. The records can be used in the selection of an account in a document.
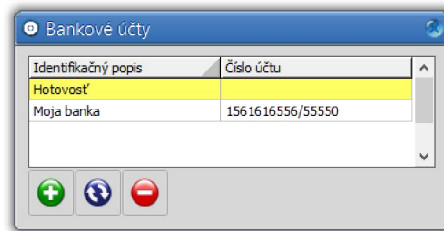
A record of each bank account contains the following data:

Identification description

Description of an account that will be displayed in a table as well as at selection of an account in a document (max. 80 characters)

Bank Name

Bank name (max. 40 characters)

Bank Address

Bank address (max. 80 characters)

Account Number

Account Number (max. 30 characters)

Identification information

Other identification data, for example. SWIFT, IBAN, etc. (max. 2 x 80 characters)

Currencies and Rates

Here you can record all currencies that you want to use in the program (an initial currency is displayed in the table in red). Moreover, you can set the exactly required format of an amount in each currency and actual exchange rate in the case of foreign currencies (any currency except the initial one is considered foreign).

A record of each currency include the following data:

Currency

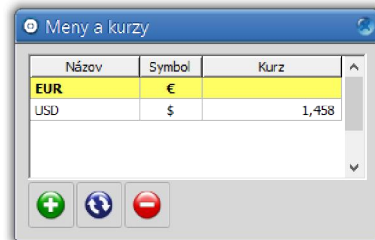International designation of the currency, e.g. "EUR", "USD" ... (max. 5 characters)

Symbol

Currency symbol (to be given together with an amount), such as "Sk", "$",... (max. 5 characters)

Exchange rate

Value of actual rate. The rate will be used in the conversion of item prices in their selection into a document in a foreign currency.

Group separator

Select the character that will be used to separate 3-digit groups in an amount (the following characters can be used: none, space, apostrophe, comma, dot)

Decimal separator

Select the character that will be used to separate decimals in an amount (you can use a comma or dot)

Form of a negative amount

There are several options from which you can choose in which form a negative amount will be displayed

Symbol location

To choose where and how a currency symbol will be placed in the case of positive amounts. The following locations are available:
• to the left
• to the right
• to the left with space
• to the right with space

To check correctness you can look at the preview of an amount formatted according your set values at the left bottom par

Taxes

In this window it is possible to record an unlimited number of rates for the basic 3 types of taxes (e.g. VAT, GST/TPS, HST, PST/TVQ). If they are not defined yet (e.g. when first starting the program), you can enter them into edit fields above the table (with max. length of 10 characters). A type may be only edited or cancelled if no rate has been entered for it in the table yet.
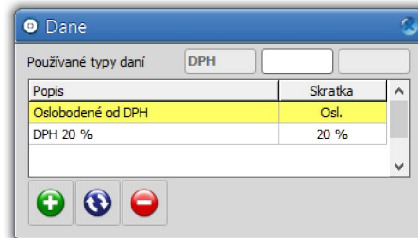
Each record contains the following information:

Type

Choose one of three basic types of taxes.

Rate

Here you can enter the tax rate in % to be used in calculation of an amount of tax in documents.

Abbreviation

Max. 8 characters. Abbreviation will be used for shortened designation of tax in documents (e.g. "19%")

Name of tax

Max. 20 characters. The name will be used to describe taxes in a document summary (e.g. "VAT 19%")

Increase tax base by the tax no. 1

This option is only available if you enter the tax no. 3. You can confirm it in the case of the so-called Compound Tax, i.e. if the tax is calculated from the tax base increased by the tax no. 1. It is, for example, used in certain provinces of Canada (Québec, Prince Edward Island) - tax of PST/TVQ type is calculated from the amount without tax, increased by the tax of GST/TPS type.

Tax is applicable

Confirm this option to indicate that the current tax (rate) is valid, otherwise the tax will be deemed cancelled (already invalid) and will not be offered at entering the items of a document items.

Note

A tax (rate) can be only edited or deleted if it has not yet been used in any document, price group or program settings.

Images
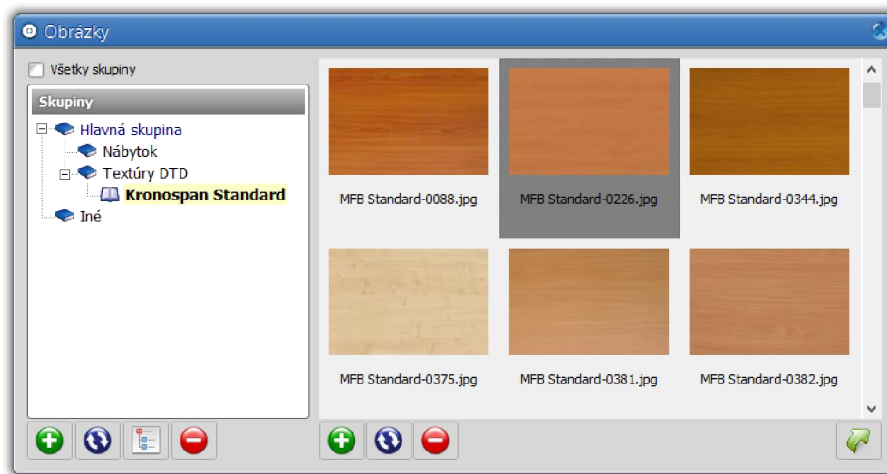
Register of images that can be assigned to stock items, products or document items. If you change the image that has already been associated with a number of items, it will be automatically changed in all of these items as well!

Loading images from file

You can load the pictures into the database in the format of JPG or PNG. You can select more files all together and add these into database all at once. With program come the pictures of the decors of the company Kronospan and you can find them in the file "Images" that can be found in the installation file of the program (C:\RK Software\Optimik\Images) ...

Specifications of Business partners and Documents

Records of specification. Each business partner or document can be assigned any specification from this list and you can use it for filtering. Each specification can contain up to 40 characters, and you can delete it only if it has not been used.
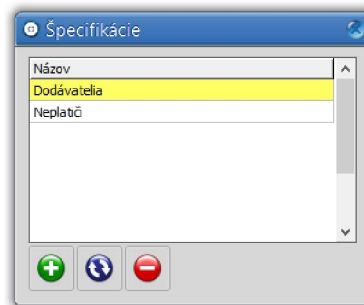
Countries and Cities

Records of countries and cities. You can use it for entering an address faster (the name of cities or country does not have to be entered manually as it can simply be selected from the records) as well as for their filtering.
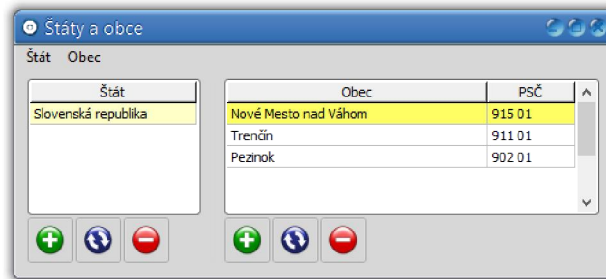
Each record of a country contains the following information:

Parameter

Name of a state (country), max. 40 characters

Form of addresses

Here you can choose in which order the individual data of an address (street, ZIP code, city, and country) will be displayed when printing a document (different countries can have their specific requirements as to the form of an address on a mail package).

Descriptions of identifiers of addresses

Here you can enter three descriptions of identifiers – e.g. tax registration numbers that will be automatically used in an address. The description can contain max. 20 characters.

Each record of a city contains the following information:

Parameter

The name of the municipality, max. 40 characters

ZIP code

Postal code (max. 15 characters)

Companies

Assigning a company can, if necessary, "link" a number of business partners. The term "company" as used herein means any form of group or "linkage" covering one or more business partners.

Possible examples of links in the records of business partners:
• several branches of the same enterprise (each branch is an independent business partner, all of them are assigned the same company)
• several enterprises cooperating in a partnership
• original and modified record of a business partner (after the change of address, identification data, name, etc.).
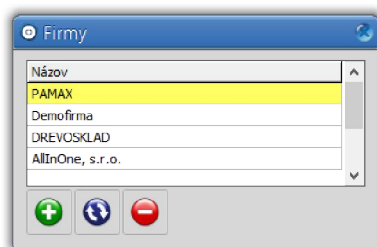
After assigning a company to more business partners, you have the option to use enriched filtering options of documents or payments. This allows you to easily filter out all jobs or documents for all branches of the same company, all members of one partnership or for older and newer versions of the data of one business partner.

Cutting parameters

Parameter

The name of the entire group of parameters, max. 30 characters

Parameters

They are described in the chapter Cutting Parameters.

Accessory

Through the accessories, each part of a product can be assigned by other items which depend on the quantity or size. This way, the consumption of other items can be automatically taken into account in the price of the product (eg. screws, paints, adhesives, etc.) and the required amounts can be calculated. You can import and export the accessories.

Using of accessory

Accessories assigned to the part material

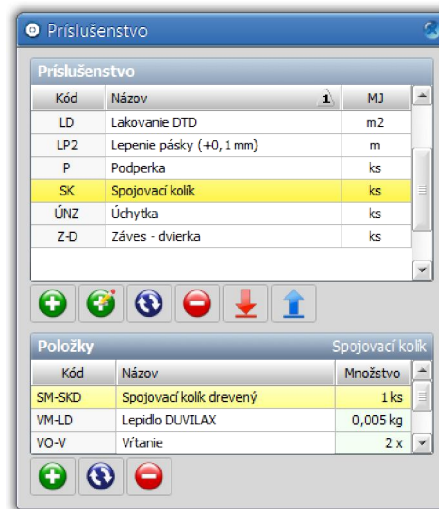Only accessories of the same type as the material can be directly assign to the part material. This way, you can for example assign the accessories „painting" to the selected printed parts and then automatically calculate the consumption of paint and other items from the total surface of these parts.

Accessories assigned to the part

Another two „extra" accessories of any type can be assigned to each part of the product. This way, you can assign accessories, for example 2x „Hinge set" + 1x „Handle set", to the printed part and then autamatically calculate the consumption of all items of these accessories (hinges, screws, washers ...) depending on the number of pieces of the particular part.

An accessory contains the following informations :

Type

Type of a material (stock item) to which the operation can be directly assigned.

Parameter

Name of operation, max. 60 characters

Code

Unique information that distinctly identifies an operation at data import and export. Its max. length is 25 characters.

Unit of measurement

Measurement unit of a stock item, to which the accessory can be assigned. Unit of measurement can only be entered for other materials/goods and operations/services.

In the case of panel materials and edging strips, it is also possible to enter a value of additional thickness. If you afterwards assign such an accessory to the selected stock item (panel materials or edging strip), the thickness of the item will be automatically increased by this value (it is especially important at calculation of correct dimensions of a component on a cutting plan when an edging strip with thickness increased as described above is used).

Accessories consist of an unlimited number of items, each of which contains the following informations :

Stock item

Selected from the list of the stock items

Quantity

Quantity required for one unit of measurement of the given operation (e.g. the weight of paint needed per 1 m2 of a panel, number of screws per one piece of hinge, etc.).

Import and export

Optimik enables data import from text file in which the data of each record (e.g. part, stock item, etc.) listed in the separate line in give order and with given name separated with selected separator. Optimik can the same way export data.

In order to protect possible duplication of some types or records by import (e.g. jobs, products, business partners, stock items) Optimik controls if the records with given number (code) already exists in the program. If yes, this will not be imported nor adjustment of this record will be performed.

In the first line of the file there must be setting in this form [~(table code)~] that defines into which table the data will be imported. If there are variety types of data at the same time (e.g. jobs, products and also items) brackets must be specified in front of each of them and single data must be ordered in logic order (because job contains products and product consists of parts, data must in the order 1.job, 2.product, 3. Part). Example :

[~(Z)~]
Job 1

[~(ZV)~]
A product of the job 1

[~(I)~]
Item 1
Item 2
Item 3

[~(ZV)~]
B product of the job 1

[~(I)~]
Item 1
Item 2

Data can be imported also automatically by program start (by running program from the "data line" providing the name and location of the imported file, e.g. "Optimik.exe C:\Jobs\JobXY.txt").
This way Optimik cooperate with other application (e.g. CAD furniture designer). For more information on the cooperating applications can be found on the site www.optimik.com.

Import / export

After clicking on the button Import (or Export) one of the following windows will display. In that window you can select, change or create format (group of parameters) that will be used by data import or export.
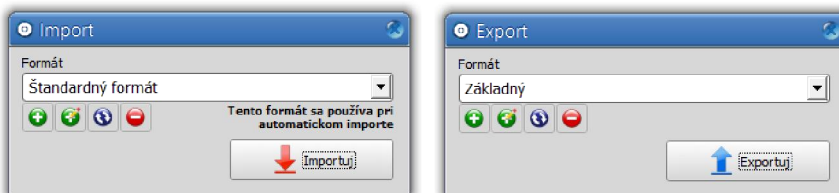
By automatic import (by program start) "Standard format" is always used. This format can be when needed adjusted, but it is not possible to deleted.

Format of import/export

In this window you can set according to your own needs all necessary parameters :

Parameter

Name of format, max. 60 characters

Data separator

You can choose one of the characters (;) (,) (|) separating individual imported/exported data in a line of text file. To view exported data in Excel, select a separating character according to the Excel version you are using (e.g. the Slovak version uses a semicolon in a CSV file, while the English version uses a comma). The standard format uses a semicolon.

File extension

When opening imported file will be automatically filtered only files that has this extension, whilst by export will be this extension automatically added to the file name.

Group separator

You can choose one of the characters (none), (space), ('), (,),(.) separating individual three-digit groups (thousands, millions) in numerical data. The standard format uses space.

Decimal separator

You can choose one of the characters (,),(.) separating decimals in figures. The standard format uses a comma.

Form of date

You can choose one of the following forms:
- Month, Day, Year
- Day, Month, Year
- Year, Month, Day
"Year, Month, Day" form is used in a standard format.

Separator in date

You can choose one of the characters (.) (/), (-) separating day, month and year in a date. The standard format uses a dash.

Logical value "Yes"

Text entry (max. 10 characters), which represents a positive logical value – e.g. "True", "Yes" and so on. The standard format uses the "+" character.

Logical value "No"

Text entry (max. 10 characters), which represents a negative logical value – e.g. "False", "No" and so on. The standard format uses "-" character.

Replace (LF) line separator with space

Confirm this option if you want to cancel the characters indicating the end of a line (Linefeed, $ 0A) in multi-line texts and replace them with a space.

Length unit

Here you can select a length unit in which data will be exported or imported. If you are using a different length unit in the program, the program will automatically convert exported/imported dimensions.

Section

By clicking on this button window displays in which you can select the order of data in accordance with your needs (or their predefined value) separately for each section.
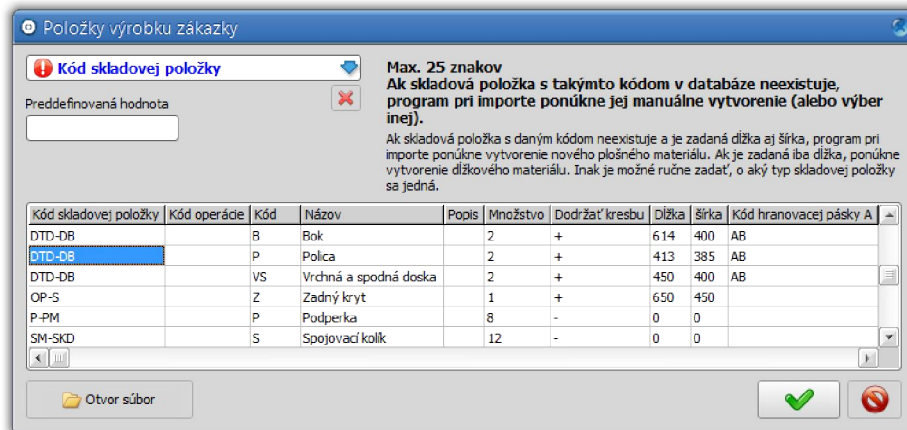
For better navigation you can include in the table data from your text file (by clicking on the button "Open file") and read information about each item of the given section in the upper part of the window.

The list of all sections can be found in chapter "Import and Export sections".

Only data of actual section

Confirming this option you give the program information that there are no brackets in the text file and that there is only data for single (selected) section.

Skip first row

Confirming this option if you want to import ignore first line of the text file (e.g. if there are given data names or other identifiers).

Import and export sections

Here you can find all the sections (tables, data...) that is possible import and export in Optimik. In each table there is given name and brackets together with list and data description.

Important data are marked :

- red colour

  when importing certain types of records (e.g. jobs, products, addresses, stock items), a check is carried out whether a record with the specific piece of data (number/code) does not already exist in the program, in order to avoid possible duplications. If such a record already exists, it will neither be imported nor modified in any way.

- blue colour

  stock item code, which must exist in program before record import. If it does not exist, program offers to create it immediately.

- purple colour

  a record with such a piece of data (if entered) must already exist in the program. If the record does not exist, import is cancelled.

- green colour

  if a record with such a piece of data does not exist in the program, it will be created automatically (usually it is a record of other records, such as country/municipality, specification, price group, or a record of other groups).

	Jobs [~(Z)~]	
1.	Job number	*Maximum of 20 characters; this must be in the form defined in the program settings. If no job number is entered, it will automatically be created in the import*
2.	Date	*Date (if not set, it will be automatically imported the actual one)*
3.	Parameter	*Maximum of 60 characters*
4.	Description	*A multi-line text*
5.	Order	*Maximum of 60 characters*
6.	Deadline	*Date (if not set, it will be automatically imported the actual one)*
7.	Additional discount	*A decimal number (maximum of +/- 320.00)*
8.	Business partner address number	*Maximum of 20 characters*
9.	Job status	*small integer numbers :0=unrealized, 1=in production, 2=produced, 3=done, 4=cancelled*
10.	Deadline has been set	*A logical value*

	Job products [~(ZV)~]	
1.	Code	*Max 25 characters*
2.	Parameter	*Maximum of 60 characters*
3.	Description	*A multi-line text*
4.	Number of pieces	*A small integer*
5.	Price	*A decimal number*
6.	Calculate price automatically	*A logical value*
7.	Virtual product	*A logical value*
8.	Weight	*Weight (EXPORTS ONLY)*
9.	Image	*Group name\Image name (if there is no such picture in the database at the time of import, the record will remain without an assigned picture)*
10.	Drawing	*Group name\Image name (if there is no such picture in the database at the time of import, the record will remain without an assigned picture)*

- *Parent table – "Jobs"*

Job Product Items [~(I)~]

#		
1.	Stock item code	maximum of 25 characters. If no stock item with the given code exists and if the length and width are specified, the import program will offer to create a new panel-based material. If only the length is defined, it will offer the creation of length-based material; otherwise you can specify the type of stock item manually.
2.	Accessory code	Max 25 characters
3.	Code	Max 25 characters
4.	Parameter	Maximum of 60 characters
5.	Description	A multi-line text
6.	Quantity	A decimal number
7.	Follow a grain	A logical value
8.	Length	A multi-line text including dimensions (various lengths are in separate lines)
9.	Width	A multi-line text including dimensions (various lengths are in separate lines) - it is not entered during the part import of bar material, when width is automatically defined from the stock item parameter
10.	Code of edging strip A	Max 25 characters
11.	Code of accessory A	Max 25 characters
12.	Thickness A	dimension (by this thickness the dimension of the part will be reduced on the cutting plan). ONLY EXPORT
13.	Code of edging band B	Max 25 characters
14.	Code of accessory B	Max 25 characters
15.	Thickness B	dimension (by this thickness the dimension of the part will be reduced on the cutting plan). ONLY EXPORT
16.	Code of edging band C	Max 25 characters
17.	Code of accessory C	Max 25 characters
18.	Thickness C	dimension (by this thickness the dimension of the part will be reduced on the cutting plan). ONLY EXPORT
19.	Code of edging band D	Max 25 characters
20.	Code of accessory D	Max 25 characters
21.	Thickness D	dimension (by this thickness the dimension of the part will be reduced on the cutting plan). ONLY EXPORT
22.	Additional thickness before running the program	Size (If not specified, value from the program settings will used)
23.		
24.	External CNC commands	A multi-line text. This record is not possible to edit directly in Optimik, it is only possible to import it (e.g. from external CAD program). In this case this record will be connected to export file for CNC cutting machine
25.	Do not adjust part dimensions	A logical value
26.	Thickness / Width	Size (ONLY EXPORT)
27.	Drawing	Group name\Image name (if there is no such picture in the database at the time of import, the record will remain without an assigned picture)
28.	Package number	A small integer
29.	Code of accessory 1	Max 25 characters
30.	Quantity of accessory 1	A decimal number
31.	Packing of accessory 1	small integer number (0=not packed, 1=packed together with item, 2=packed separately)
32.	Code of accessory 2	Max 25 characters
33.	Quantity of accessory 2	A decimal number
34.	Packing of accessory 2	small integer number (0=not packed, 1=packed together with item, 2=packed separately)

- *Parent table - "Job Products"*

Business partners [~(A)~]

#		
1.	Group description	Maximum of 30 characters. If not specified, the address will be assigned to the current group at import.

2.	Company	*Maximum of 60 characters*
3.	Address number:	*Maximum of 20 characters*
4.	Parameter	*Maximum of 80 characters*
5.	Street	*Maximum of 60 characters*
6.	ZIP code	*Maximum of 15 characters*
7.	City	*Maximum of 40 characters*
8.	State	*Maximum of 40 characters*
9.	Other delivery address	*A logical value*
10.	Name (delivery address)	*Maximum of 80 characters*
11.	Street (delivery address)	*Maximum of 60 characters*
12.	ZIP code (delivery address)	*Maximum of 15 characters*
13.	City (delivery address)	*Maximum of 40 characters*
14.	State (delivery address)	*Maximum of 40 characters*
15.	Contact person	*Maximum of 1 text line*
16.	Phone	*Maximum of 1 text line*
17.	E-mail	*Maximum of 1 text line*
18.	WWW	*Maximum of 1 text line*
19.	Note	*A multi-line text*
20.	Identification number 1	*Maximum of 1 text line*
21.	Identification number 2	*Maximum of 1 text line*
22.	Identification number 3	*Maximum of 1 text line*
23.	Specification 1	*Maximum of 40 characters*
24.	Specification 2	*Maximum of 40 characters*
25.	Specification 3	*Maximum of 40 characters*
26.	Tax 1	*A logical value*
27.	Tax 2	*A logical value*
28.	Tax 3	*A logical value*
29.	Additional discount	*A decimal number*
30.	Warning	*Maximum of 1 text line*
31.	The address is current	*A logical value*
32.	Include discount directly into the price of document item	*A logical value*

● *Parent table – "Business Partners"*

Stock items [~(S)~]		
1.	Stock group description	*Maximum of 60 characters. If not specified, the inventory item will be assigned to the main group of the given type at import.*
2.	Code	*Max 25 characters*
3.	Type	*A small integer: 1=panel material, 2=length material, 3=edging strip, 4=other material or goods, 5=operation or service*
4.	Parameter	*Maximum of 60 characters*
5.	Description	*A multi-line text*
6.	Unit of measurement	*Maximum of 6 characters*
7.	Barcode	*Maximum of 20 characters*
8.	Minimum reserve	*A decimal number*
9.	Over-consumption	*A decimal number ranging between 0.00 – 300.00 (%)*
10.	Colour	*An integer*
11.	Material has an oriented drawing	*A logical value only relevant for panel materials*
12.	Thickness / Width	*A size only relevant for types 1 to 3*
13.	Unit weight	*Weight*

14.	Warning	*Maximum of 1 text line*
15.	Selling price	*A decimal number*
16.	Price	*A decimal number (export Current price - FIFO, imports as Initial price - except panel and bar materials)*
17.	Stock	*A decimal number (export Current stock, imports as the Initial stock - except panel and bar materials)*
18.	Over-consumption of the edging strip (length for each edge)	*dimension (important only for type 3)*
19.	Internal Note	*A multi-line text*
20.	Supplier number	*Maximum of 20 characters*
21.	Stock item is active	*A logical value*
22.	Image	*Group name\Image name (if there is no such picture in the database at the time of import, the record will remain without an assigned picture)*

- *Parent table – "Stock Groups"*

- *if the stock item with that code already exists, it will not be skipped but updated during the import !*

Formats of panel and bar materials [~(PV)~]

1.	Parameter	*Maximum of 60 characters*
2.	Length	*Size (ONLY EXPORT)*
3.	Width	*Size (ONLY EXPORT)*
4.	Offcut	*A logical value*
5.	Selling price	*A decimal number*
6.	Price	*A decimal number (export Current price - FIFO, imports as Initial price - except panel and bar materials)*
7.	Stock	*A decimal number (export Current stock, imports as the Initial stock - except panel and bar materials)*
8.	Internal Note	*A multi-line text*
9.	Unlimited stock balance	*A logical value (cannot be enabled for cutoffs)*
10.	Use in the cutting plan	*A logical value*
11.	Size	*1 character (A-D)*

- *Parent table – "Stock Items"*

Update of stock [~(S-upd)~]

1.	Stock item code	*Max 25 characters*
2.	Format parameter	*max. 60 characters (only for panel/bar material)*
3.	Format length	*dimension (only for panel/bar material)*
4.	Format width	*dimension (only for panel/bar material)*
5.	Offcut	*logical value (only for panel/bar material)*
6.	Current value FIFO	*decimal number (if not given, the value of the stock item/format will be not changed)*
7.	Selling price	*decimal number (if not given, the value of the stock item/format will be not changed)*
8.	Current stock	*decimal number (if not given, the value of the stock item/format will be not changed)*
9.	Unlimited stock balance	*A logical value (cannot be enabled for cutoffs)*
10.	Use is in the cutting plan	*A logical value*
11.	Size	*1 character (A-D)*

- *After this import receipt card is automatically generated for all needed items.*
  In order to reach the required level of stock reserve, receipt card will be by import automatically created
  For the particular stock items (or formats – in case of panel sheets and bar materials). Their quantities will be computed from the difference between actual and needed reserve.

  This import can be used for example if stock evidence is done in other program and you need to reconcile inventory records with these in OPTIMIK.

Accessory [~(O)~]

1.	Code	*Max 25 characters*

2.	Type	A small integer: 1=panel material, 2=length material, 3=edging strip, 4=other material or goods, 5=operation or service
3.	Parameter	Maximum of 60 characters
4.	Unit of measurement	Maximum of 6 characters
5.	Additional thickness before running the program	Size (ONLY EXPORT)

-

⚙ Accessory items [~(OP)~]

1.	Stock item code	Max 25 characters
2.	Quantity per unit of accessory	A decimal number

- *Parent table – "Accessory"*
- *It is not possible to import other items into an accessory which has already been used in the program.*

▦ Products [~(V)~]

1.	Group description	Maximum of 60 characters. If not specified, in the import the product will be assigned to the current group.
2.	Code	Max 25 characters
3.	Parameter	Maximum of 60 characters
4.	Description	A multi-line text
5.	Price	A decimal number
6.	Image	Group name\Image name (if there is no such picture in the database at the time of import, the record will remain without an assigned picture)
7.	Drawing	Group name\Image name (if there is no such picture in the database at the time of import, the record will remain without an assigned picture)

- *Parent table – "Product Groups"*

▦ Product parameters [~(VP)~]

1.	Code	Maximum of 10 characters. If no such parameter exists in the parameter records, it will automatically be created. However, if a parameter with this code already exists in the current product, the import will be cancelled!
2.	Parameter	Maximum of 30 characters
3.	Type	A small integer (-1=size,0=number of pieces, 1-5=identical to the type of stock item)
4.	Stock item code	Max 25 characters
5.	Accessory code	Max 25 characters
6.	Unit Price	A decimal number
7.	Size	Size (only for parameters of "size", "panel material", and "edging strip" types)
8.	Number of pieces	A small integer (only for the parameter of "number of pieces" type)

- *Parent table – "Products"*

▦ Product Items [~(VI)~]

1.	Parameter code (material)	Maximum of 10 characters (if this code has not been entered, a stock item code must be entered)
2.	Code	Max 25 characters
3.	Parameter	Maximum of 60 characters
4.	Description	A multi-line text
5.	Quantity	A decimal number
6.	Quantity adjustments	A small integer – 0=quantity unchanged, 1=multiplied by the selected parameter of the "number of pieces" type, 2=the value of parameter is added to the quantity
7.	Parameter code (number of pieces)	Maximum of 10 characters
8.	Follow a grain	A logical value
9.	Length	A multi-line text including dimensions (various lengths are in separate lines)
10.	Width	A multi-line text including dimensions (various lengths are in separate lines)

11.	Parameter code (strip A)	Max 25 characters
12.	Thickness A	Size (ONLY EXPORT)
13.	Parameter code (strip B)	Max 25 characters
14.	Thickness B	Size (ONLY EXPORT)
15.	Parameter code (strip C)	Max 25 characters
16.	Thickness C	Size (ONLY EXPORT)
17.	Parameter code (strip D)	Max 25 characters
18.	Thickness D	Size (ONLY EXPORT)
19.	Additional thickness before running the program	Size (ONLY EXPORT)
20.	Weight	Weight (ONLY EXPORT)
21.	External CNC commands	A multi-line text. This record is not possible to edit directly in Optimik, it is only possible to import it (e.g. from external CAD program). In this case this record will be connected to export file for CNC cutting machine
22.	Do not adjust part dimensions	A logical value
23.	Stock item code	Maximum of 25 characters (if this code has not been entered, a parameter code must be entered)
24.	Accessory code	Max 25 characters
25.	Drawing	Group name\Image name (if there is no such picture in the database at the time of import, the record will remain without an assigned picture)
26.	Package number	A small integer
27.	Code of accessory 1	Max 25 characters
28.	Quantity of accessory 1	A decimal number
29.	Packing of accessory 1	small integer number (0=not packed, 1=packed together with item, 2=packed separately)
30.	Code of accessory 2	Max 25 characters
31.	Quantity of accessory 2	A decimal number
32.	Packing of accessory 2	small integer number (0=not packed, 1=packed together with item, 2=packed separately)

- *Parent table – "Products"*

Instructions for editing parameters and transferring the product to the current order [~ (X) ~]

1.	Product code	Max 25 characters
2.	Number of pieces	A small integer
3.	Parameters	A multi-line text "Parameter Code	Inv. Item Code	Operation Code	Size or Count" (the stock item and operation must exist …)
4.	Code of product in job	Maximum of 25 characters (optional - if not specified, the code will be detected from the transfered product)
5.	Name of product in job	Maximum of 60 characters (optional - if not specified, the name will be detected from the transfered product)

- *if there is no job yet, a new one will be created automatically …*

- *transfer of the product into the job will be done at the end of the import*
  therefore it is not possible at the same time import products [~X~] and their additional items [~I~]

Simplified import parts directly to cutting plans [~(II)~]

1.	Material (stock item) code	max. of 25 characters. If there is any cutting plan not yet calculated for this material, the component will be imported in it. Otherwise the panel will be imported into a new cutting plan.
2.	Job	Max 25 characters
3.	Product	Max 25 characters
4.	Part code	Max 25 characters
5.	Part name	Maximum of 60 characters
6.	Number of pieces	An integer
7.	Follow a grain	A logical value
8.	Length	A multi-line text including dimensions (various lengths are in separate lines)

9.	Width	*A multi-line text including dimensions (various lengths are in separate lines) - it is not entered during the part import of bar material, when width is automatically defined from the stock item parameter*
10.	Code of edging strip A	*Max 25 characters*
11.	Code of edging band B	*Max 25 characters*
12.	Code of edging band C	*Max 25 characters*
13.	Code of edging band D	*Max 25 characters*
14.	Additional thickness before running the program	*Size (ONLY EXPORT)*
15.	External CNC commands	*A multi-line text. This record is not possible to edit directly in Optimik, it is only possible to import it (e.g. from external CAD program). In this case this record will be connected to export file for CNC cutting machine*
16.	Do not adjust part dimensions	*A logical value*

-

📚	Simplified import formats for cutting plans [~(NF)~]	
1.	Material (stock item) code	*max. of 25 characters. If there is any cutting plan not yet calculated for this material, the format will be imported in it. Otherwise the panel will be imported into a new cutting plan.*
2.	Parameter	*Maximum of 60 characters*
3.	Length	*Size (ONLY EXPORT)*
4.	Width	*Size (ONLY EXPORT)*
5.	Offcut	*A logical value*
6.	Number of pieces	*An integer*
7.	Unlimeted stock value	*A logical value (cannot be enabled for cutoffs)*
8.	Use in the cutting plan	*A logical value*

Explanatory notes:

Maximum of XX characters
> a text with a maximum length of XX characters

Logical value
> Yes/No, 1/0, +/-, - upon selection of the format

Date
> date in the selected format

Multi-line text
> a text in multiple lines, with individual lines separated by a LF (LineFeed, $0A) character. If the text contains multiple lines (i.e. at least one LF character is present), this is indicated in quotes.

Small integer
> a number ranging between 0-32000

Size
> a decimal number indicating length. Unit of measurement (mm, cm, dm, m, inch, feet) is defined in the selected format

Weight
> a decimal number indicating weight. Unit of measurement is defined in the program settings ...

EXPORTS ONLY
> this information is only relevant for exports. When you try to import, the item is ignored – its value is calculated by the program ...

How to start ?

1. Choose the database

Optimik program is supplied with DEMO database where you can find an illustrative data and use it as a start menu. Before starting to work with the program, create a new database in a selected folder(1) where you will enter your real data. Click on Menu – Database – New (2) and enter its name. If you have been using the older version Optimik program 2.36c, you can shift all your data into the new database by clicking on Menu – Database – New. Set the required database in the list (3) and click on the button "Open" (4).
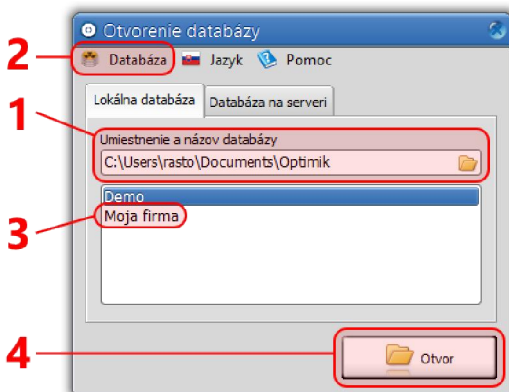
2. Enter material

Once the database is opened, enter the material you are using in the production. Click on the button (1) and open the module "Stock". Choose the type of material you want to add into the program in the panel(2) . The new window, where you will set all the information about the material and its format, will be opened after clicking on the button(3) . If you need, you can add another format by clicking on the button (4).
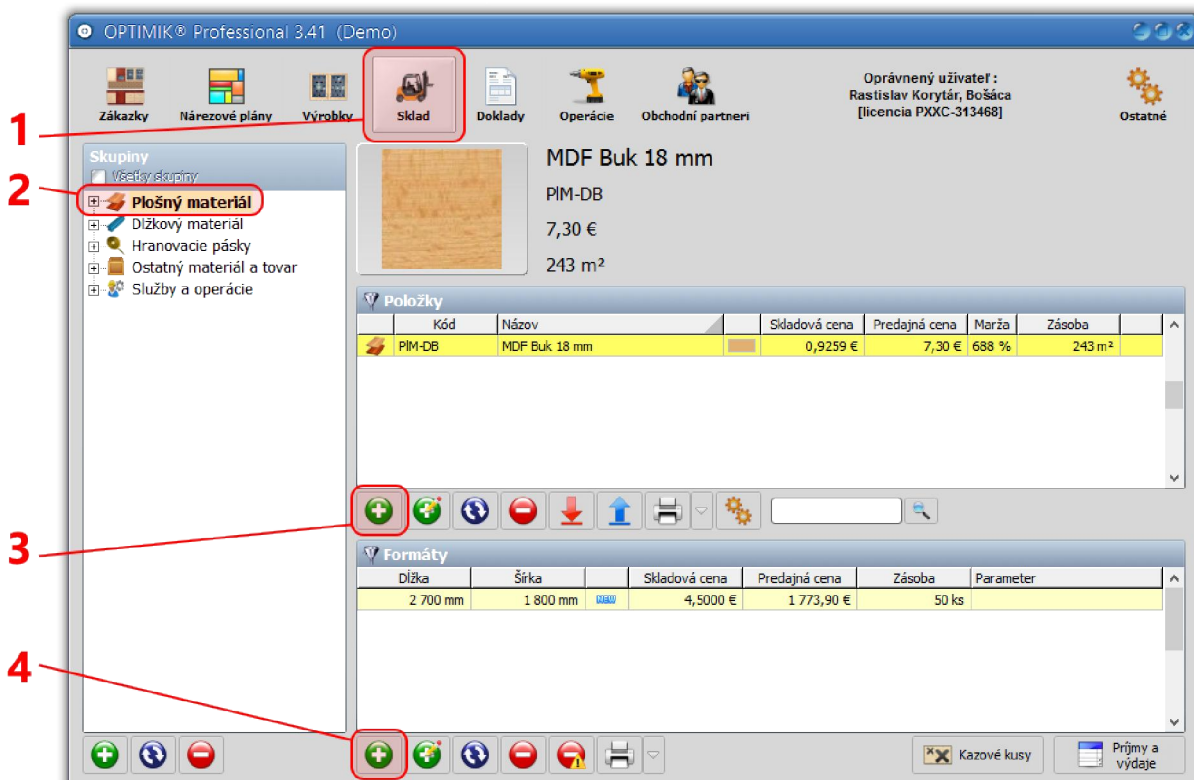
3. Create a first job

Open the module "Jobs" (1) and click (or set the mouse cursor) on the panel (2) and the pop-up list, where you can create your first job (3), will appear.
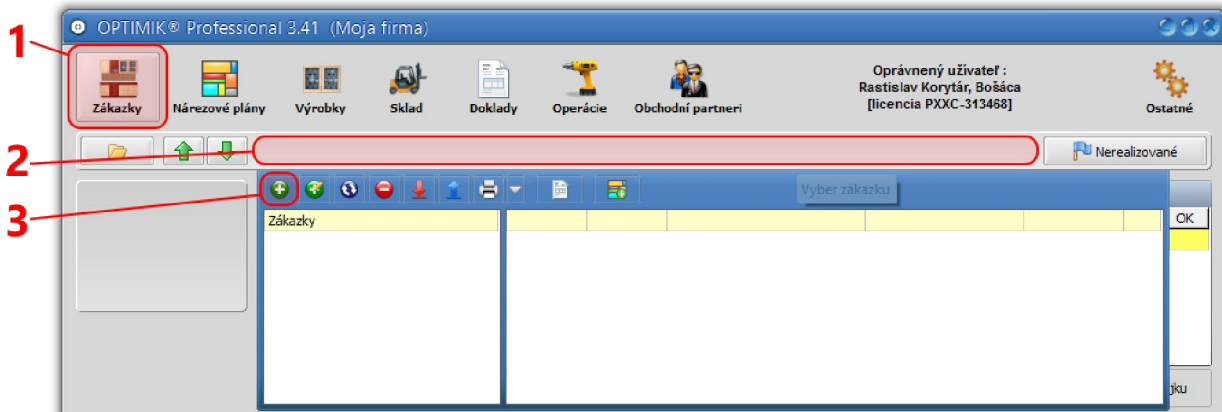
4. Enter items

Add a new product (1) and its components (2)into a new job. Then, set the selected component/material (3) and click on the button (4) and the calculation of cutting plan for all material and job components will launch.
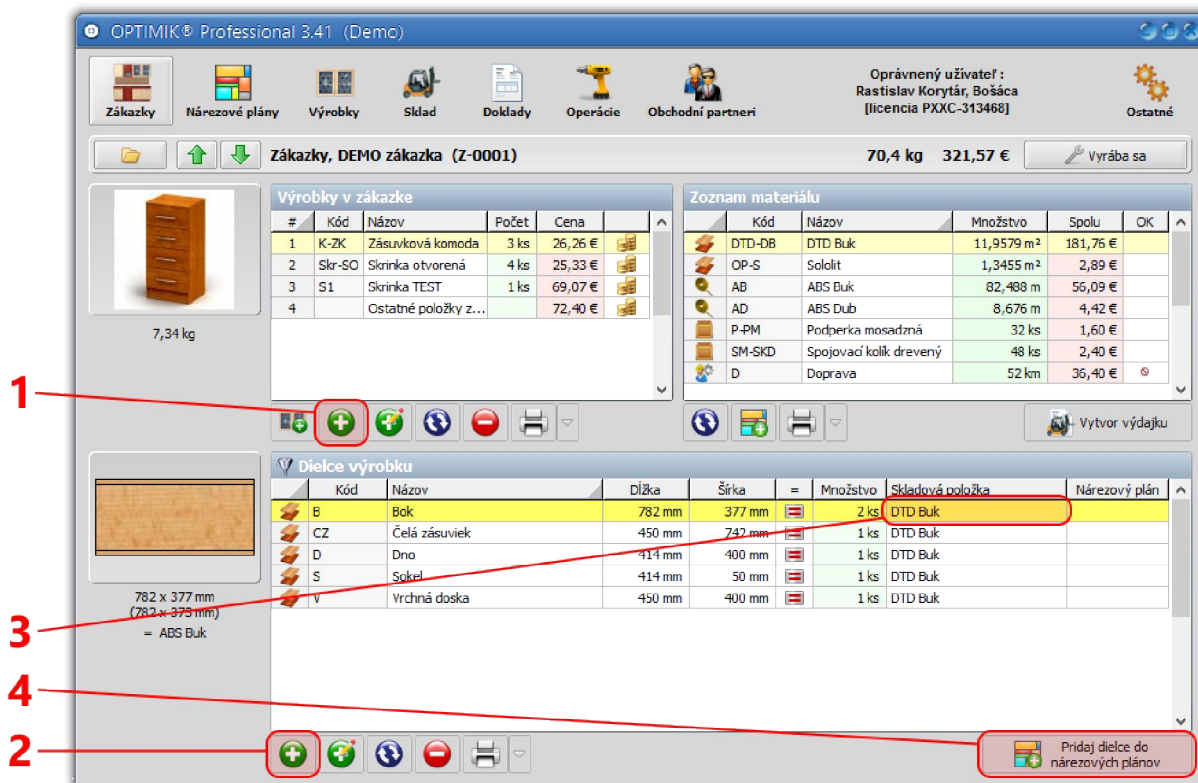
5. Your first cutting plan is done :-)

Once the calculation is finished the module "Cutting plans" (1) will open automatically. You can find there calculated cutting plan as well as the list of used formats (3) and items (4).

Additional modules

Automatic mode

This module allows you to use Optimik® in the so called automatic mode. It means that Optimik® imports data related to the job, its products and components of the selected item automatically. After import, Optimik® creates and computes the cutting plan for all these parts. Furthermore, Optimik® automatically exports all pictures and data of the cutting plans into a selected file.

Automatic mode allows you to use Optimik® effectively also for the other applications. Nowadays, e.g. the connection with the on-line system eRozrys from NeronIT company is provided in this way.
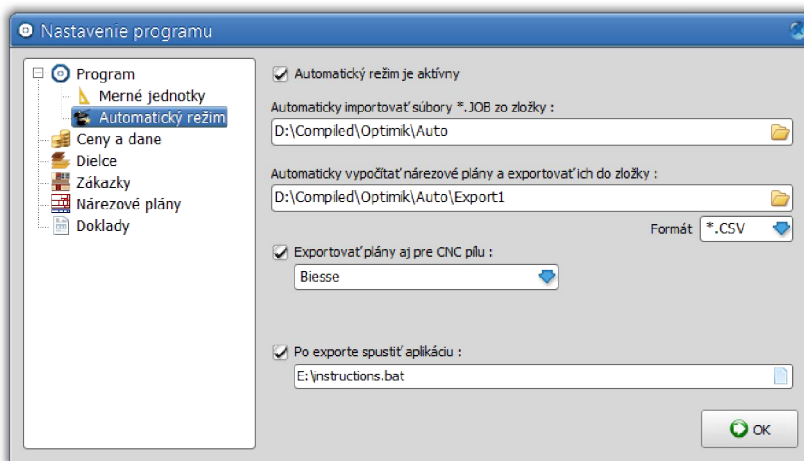
Automatic mode is active

Confirming this option automatic regime will be switched on, and that means that the program will import job data from the text files *.JOB, creates cutting plans on its own, then computes these and makes export. Text files *.JOB have the same structure as *.CSV (explained in the chapter "Data import and export") the only difference is that these can contain data only about single job.

*Import files *.JOB automatically from folder*

Select folder from which program automatically imports files *.JOB. If there is by automatic computation an error, program changes the extension of the file to "___" and creates next file in the format "original name.log", in which error message is displayed. If the whole process runs with no errors, program changes the file extension to "OK".

Compute cutting plans automatically and export these into folder

Here select folder into which exported files with computed cutting plans are to be saved. Here you have saved files with pictures of the cutting plans (in the format "original name- number of the plan- number of the panel.png") and text file with data about the cutting plan (in the format "original name-number of the plan.csv").

Export plans also for the CNC cutting machine

Confirm this option if you want for the automatically computed cutting plans create also exported files for selected CNC saw machine. In such case, there will be in the folder for export, sub-folder created with the same name as has imported file, and into this sub-folder all necessary files will be saved.

After exporting, run the application

If you confirm this option, selected file (application) will automatically running (opening) after successful import, calculation and export of the Job.

*Structure of *.JOB file*

Basically it is a standard CSV text file with informations about the Job, its Products and components. Description of the file structure can be found in the section "Import and export". In addition to standard sections (Z/ZV /I) there may be a special section [~(Ini)~], where you can change the cutting parameters for each material, for example :

[~(Ini)~]
1;Beech-1;Cutting CNC

1 = required field

Beech-1 = material code (if not specified, it applies to all materials imported Job)

Cutting CNC = name of cutting parameters

Re-importing the same Job

If you need to re-calculate the plans for the same Job (eg. after a change of material or components), do not overwrite or remove manually any files. Optimik want to retrieve the necessary information from original files for correct erase all previous files and folders, as well as the Job and Cutting plans in the program.

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