



FM3 Basics User Guide

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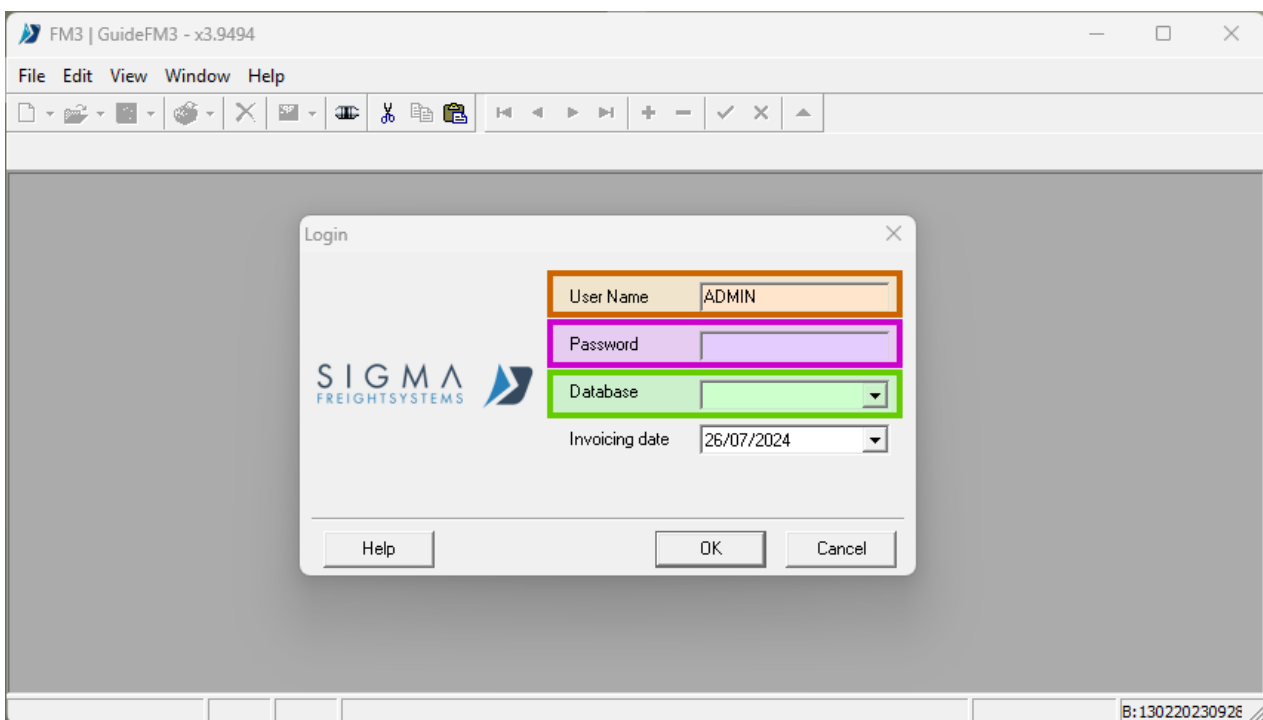
Additional Help 24

KEY POINTS

- Ensure you log in to the correct database (Check with Sigma Support or Manager).
- Individual unique Username and Password required.
- The toolbar holds most functions, similar to Microsoft Office.
- Reports create printable PDF documents.
- Multiple jobs can be open at once, switch between them via the job ref tabs.
- Any jobs you open will be locked and nobody else can edit them until you have closed it.

LOGGING IN

After opening the FM3 application, this log-in screen will appear, like most log-in screens FM3 will require a personal **Username** and **Password**. However, it will also ask to choose a **Database**, in most cases, this will be the Live database, but this can be configured so check with Sigma support or a manager.

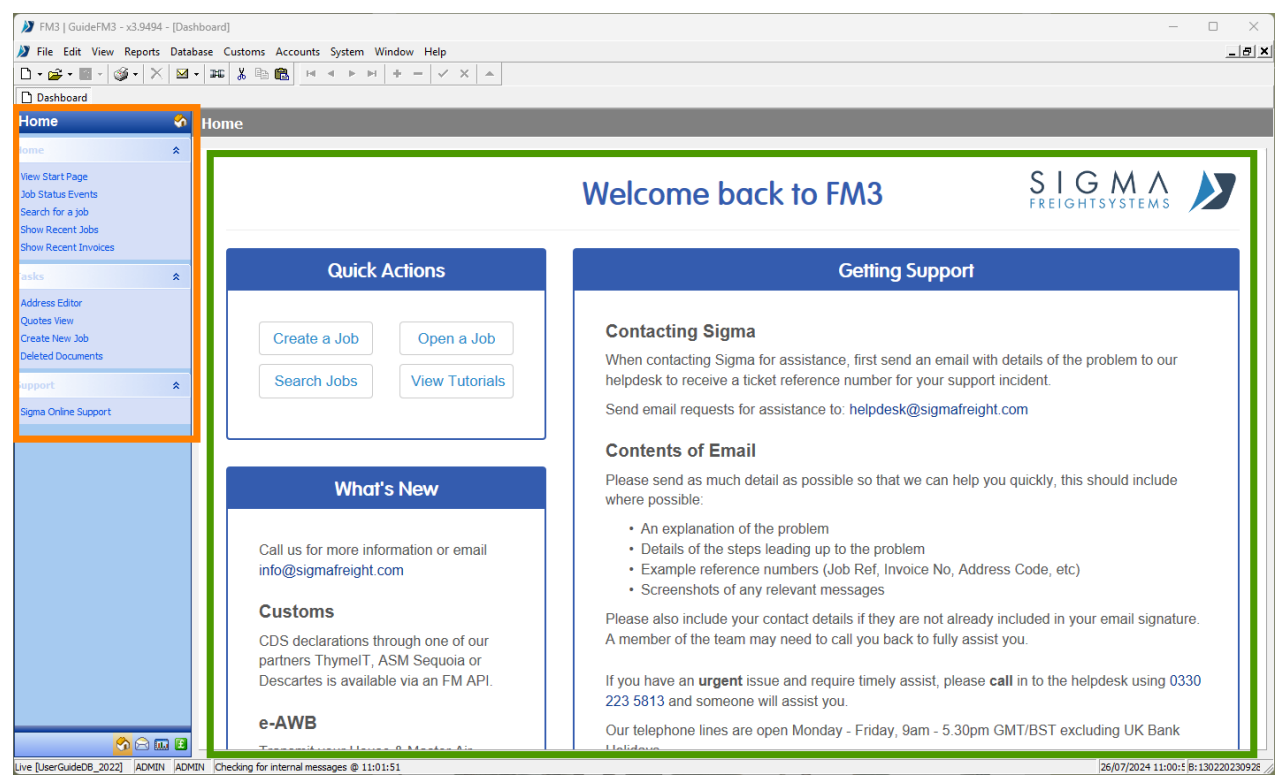


FM3 > Login

When the information is entered, select 'OK' or click enter.

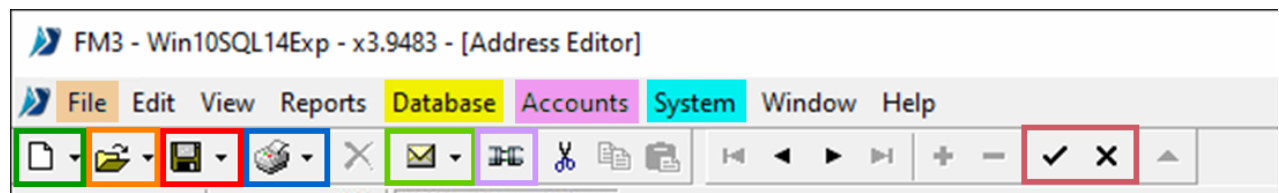
MENUS

Once logged in the FM3 Dashboard will load, this contains **links to key pages** to the left and **information** on the right.



FM3 > Dashboard

Towards the top of the FM3 application, lies a Toolbar, which holds most functions across all pages.



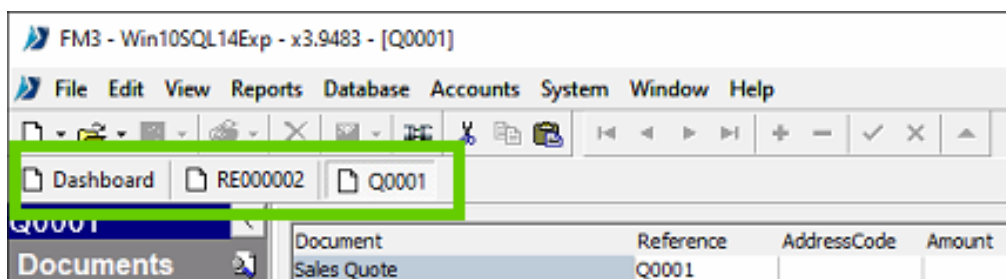
FM3 > Toolbar

New	Create a new Job or Document.
Open	Open a Document with the reference number or click the arrow to search.
Save	Save changes to the current Job/Document.
Print	This will open the 'Reports' window to export data in PDF form.

Email	Allows you to send emails from FM3.
Connect	Connect/Disconnects from database and can be used to log out then log in to another database or as another user.
Save / Cancel	Tick saves changes you have made to the open document, whereas Cross cancels changes made.
File	File tab contains the above functions in list form, including 'Exit' which will close FM3.
Database	Database tab holds different editable databases (e.g., Address Editor)
Accounts	Accounts tab encompasses functions related to financial information (such as 'Sales View' and 'Profit and Loss')
System	Features such as 'Administration' are kept under System tab. Unlikely to need to use this tab.

Open job bar

Multiple jobs can be open at once, to switch between them, locate the **Open job bar** and click the reference of the job you want to view.



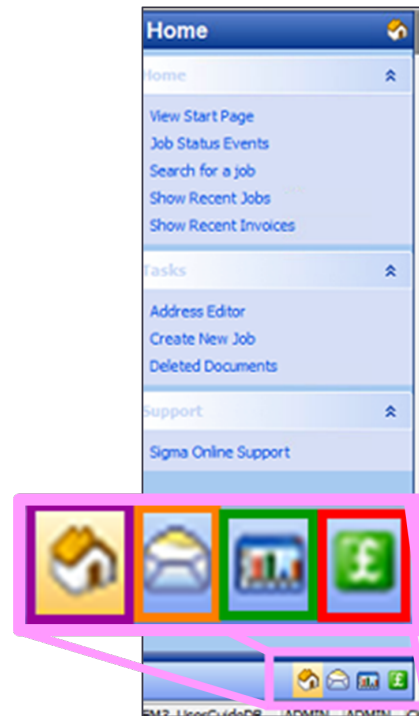
FM3 > Open Job Bar

Dashboards

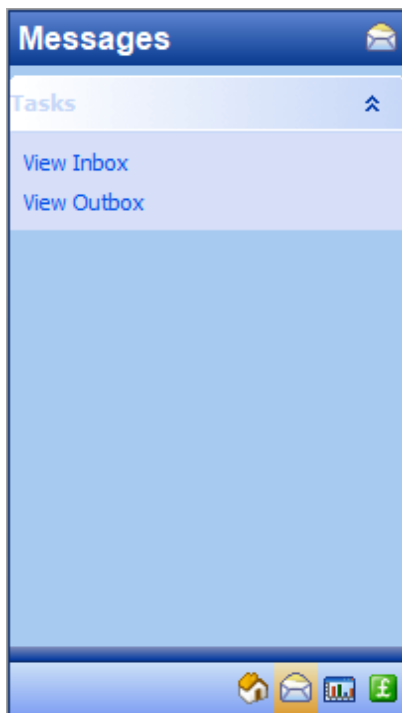
When in the main 'Home' dashboard, **icons to other dashboard pages** reside beneath the linked taskbar.

These are:

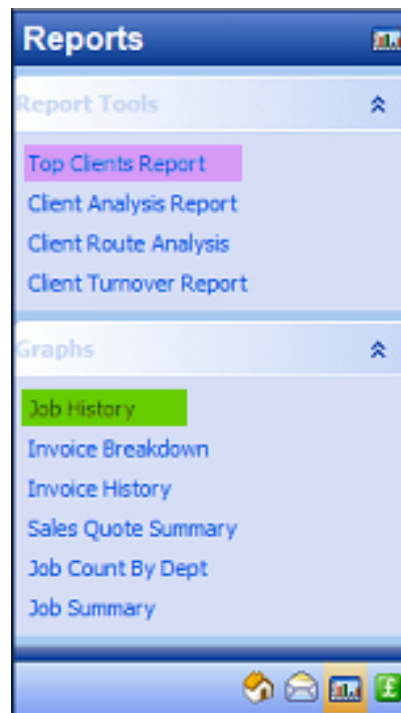
- **Home**, represented by a house.
- **Messages**, found under the envelope button.
- **Reports**, shown as a graph, holds multiple summary tools to visually show FM3 reports (such as **Top Clients** and **Job History**)
- **Financial Tools**, located through the '£' icon, provides insights into financial data (e.g., Profit/Loss)



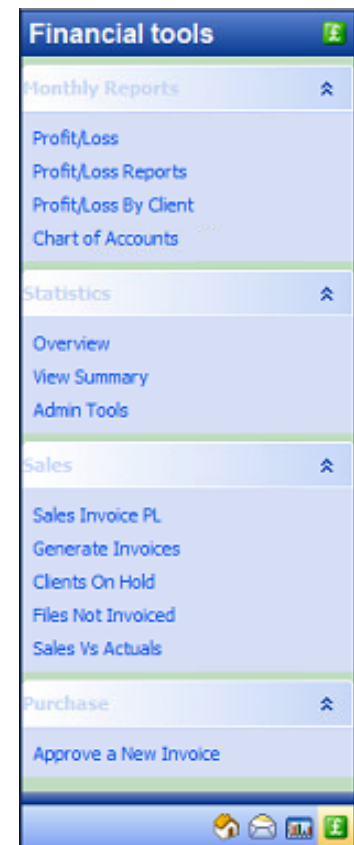
FM3 > Dashboards



FM3 > Messages Dashboard



FM3 > Reports Dashboard



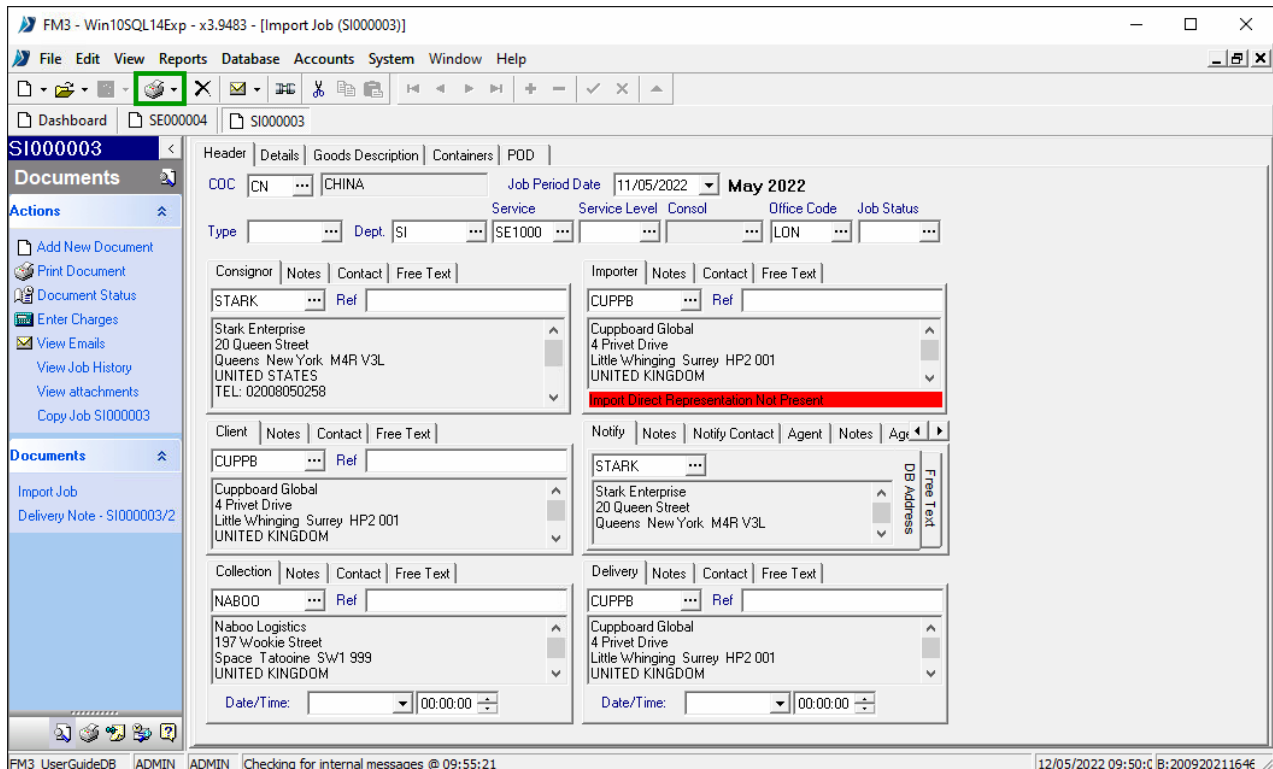
FM3 > Financial Tools Dashboard

REPORTS

Documents can be exported with information from the job carried over and either sent to a printer or to a client/colleague via email.

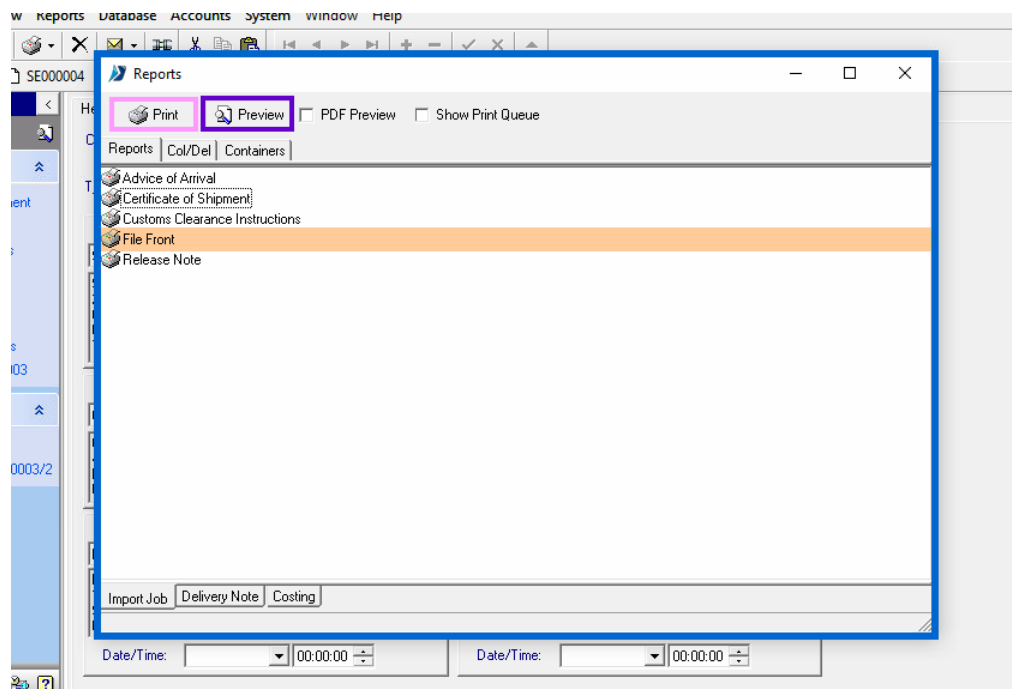
Print

From jobs, FM3 allows documents to be printed with the specific job data already keyed in. To access these printable PDFs, open a job and select the **printer** icon in the top toolbar or use the shortcut 'Ctrl + P'.



FM3 > Open Job > Print Icon

The following **menu** will appear populated with different PDF reports, corresponding to the distinctive documents needed throughout the job process. As an example, if we want to print a **File Front**, first check the document is correct by double-clicking the report name or selecting **Preview**. If all is correct, click **Print**.



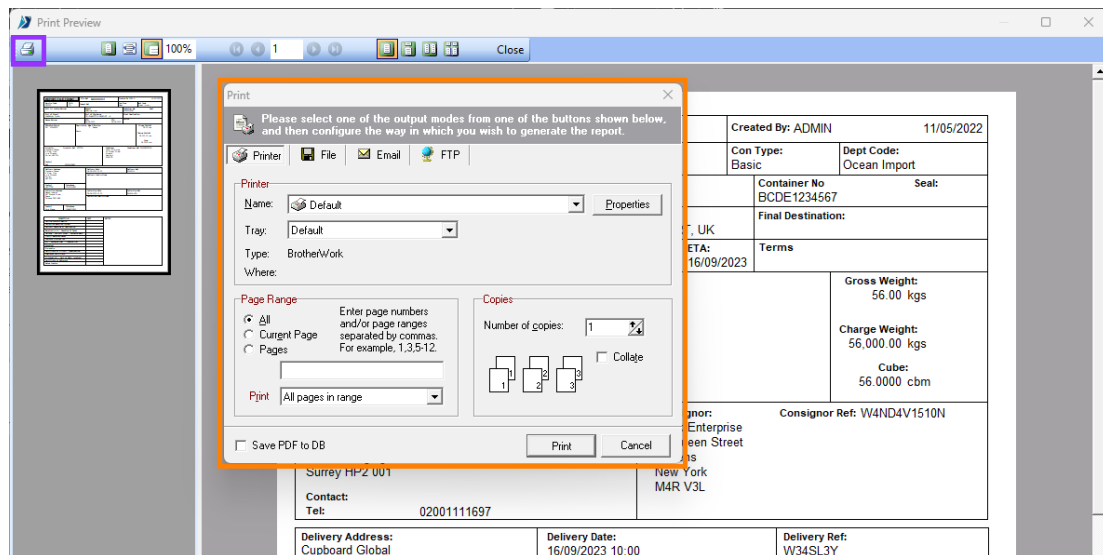
FM3 > Open Job > Print Reports Screen

Below is a File Front example which has pulled through the information from the job, mainly the **addresses** and **item/container details**, as more data is entered in the job, more data will fill out the report. If data is missed and a box is blank, you can return to the job, enter the information and reopen the PDF Preview. This box will then be filled in.

Print Preview

IMPORT FILE FRONT		File Ref: SI000003	Created By: ADMIN 11/05/2022	
Service Code: SE1000	COD: CN	Consol Ref:	Con Type:	Dept Code: Ocean Import
Bill Of Lading Number:	Vessel: California Luna	Container No: BCDE1234567	Seal:	
Port of Export: SHANGHAI, CHINA	Port of Discharge: SOUTHAMPTON SEAPORT, UK	Final Destination:		
House Number:	ETD:	ETA:	Terms	
Shipping Marks: NO. 12345678	Description, Nos & Packing: 3 Boxes Books	Gross Weight: 56.00 kgs	Charge Weight: 56,000.00 kgs	
		Cube: 56.0000 cbm		
Importer: Cupboard Global 4 Privet Drive Little Whinging Surrey HP2 001 Contact: Tel: 02001111697		Consignor: Stark Enterprise 20 Queen Street Queens New York M4R V3L Consignor Ref:		
Delivery Address: Cupboard Global 4 Privet Drive Little Whinging Surrey HP2 001 Contact: Telephone: 02001111697		Delivery Date:	Delivery Ref:	
		Delivery Instructions:		
Collection Address: Naboo Logistics 197 Wookie Street Space Tatooine SW1 999		Collection Date:	Collection Ref:	
		Collection Instructions:		

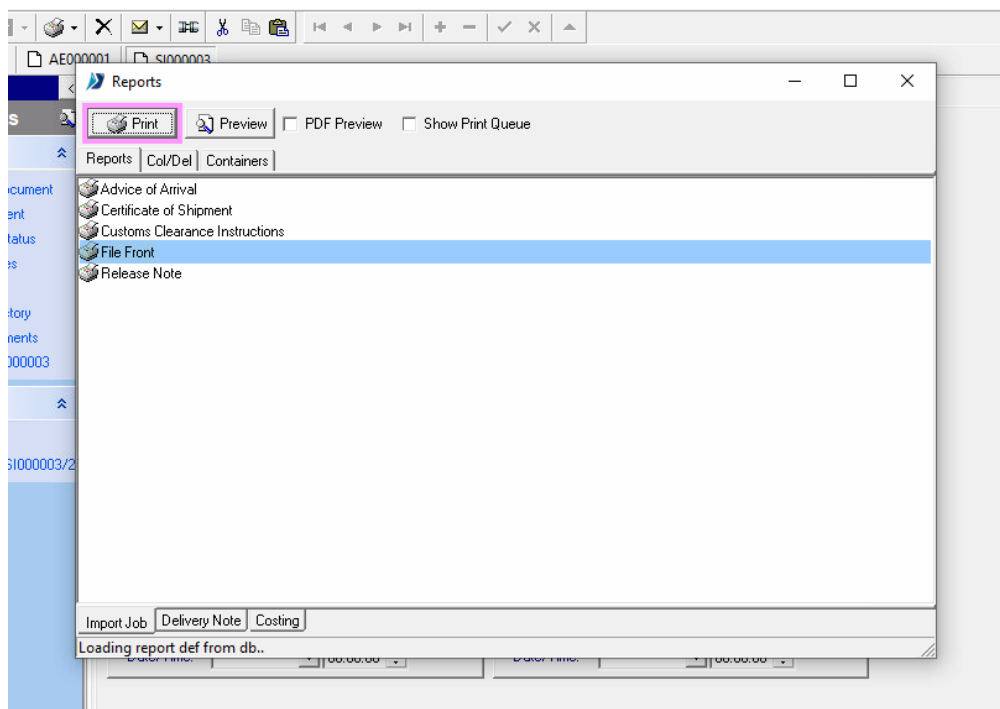
Open Job > Print > Select Report > Print Preview



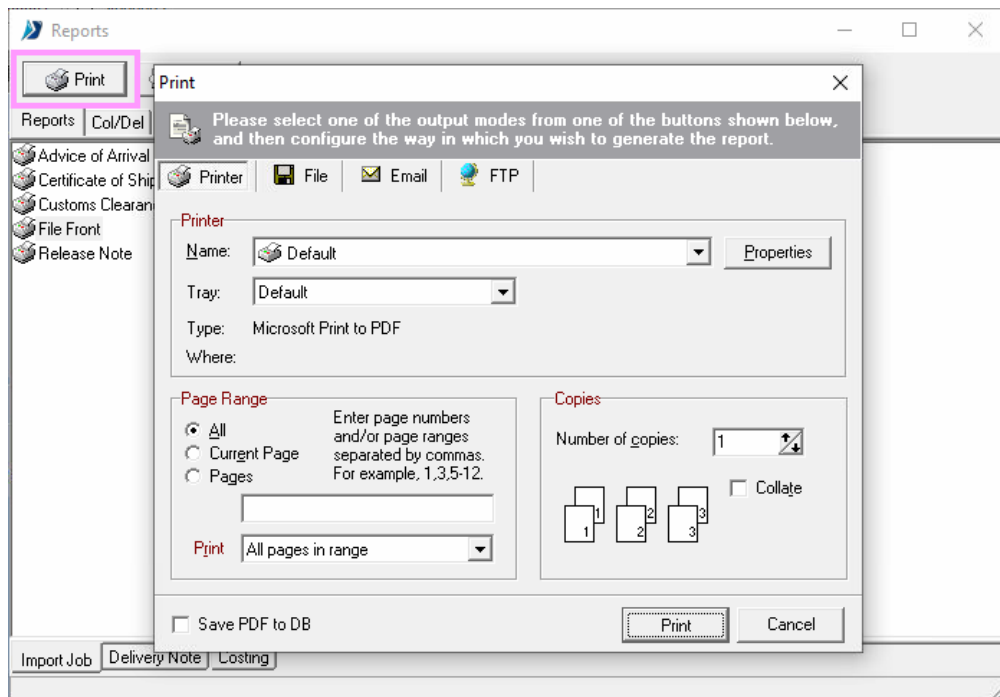
Open Job > Print > Select Report > Print Preview > Print Pop-Up

From this view, to print, select the **printer icon** in the top left corner. This will bring up a 'Print' pop-out, allowing you to export the document via multiple routes, in this case, we need the print tab seen above. In addition to print, this page provides a 'save file' and 'email' function.

Another route to print would be back in the Reports page, via the **'Print'** button at the top. Ensure you select the report you want to print before clicking 'Print'.



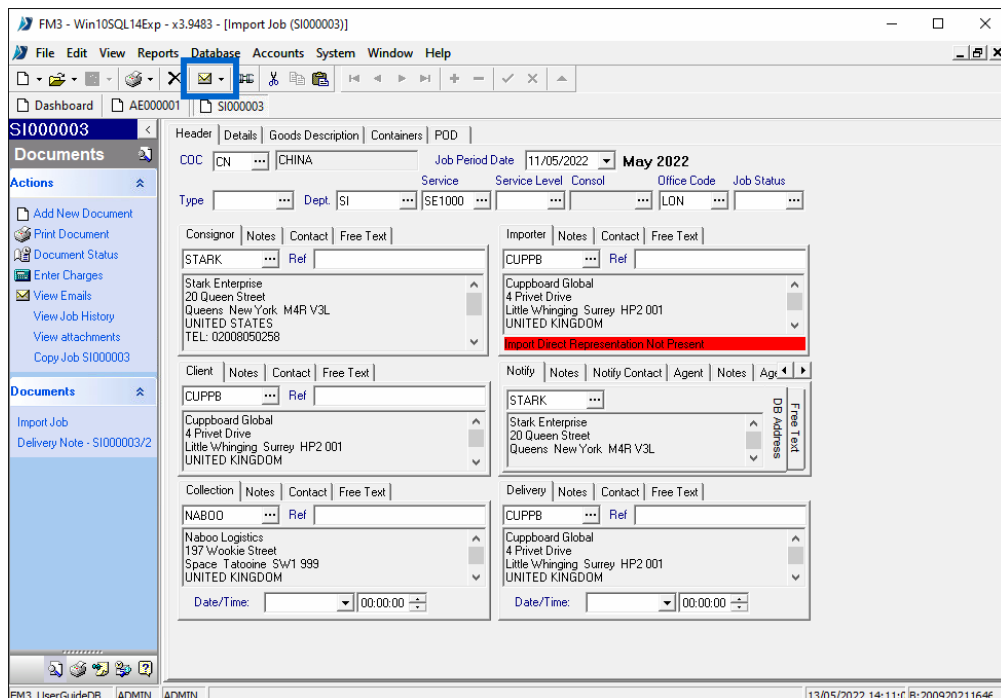
Open Job > Print > Select Report > Print Icon



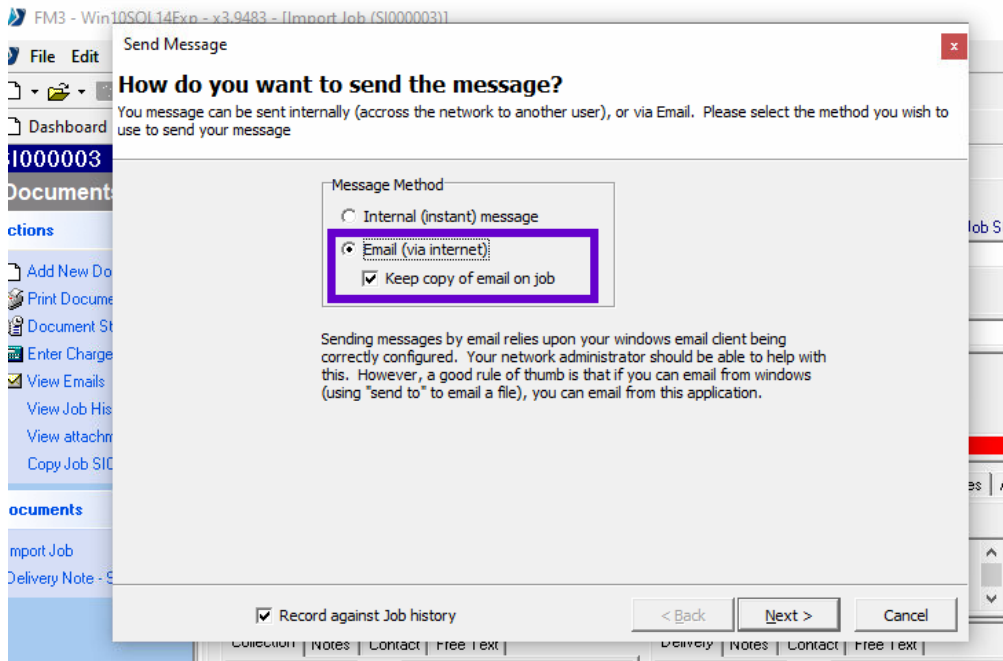
Open Job > Print > Select Report > Print Pop-Up

Email

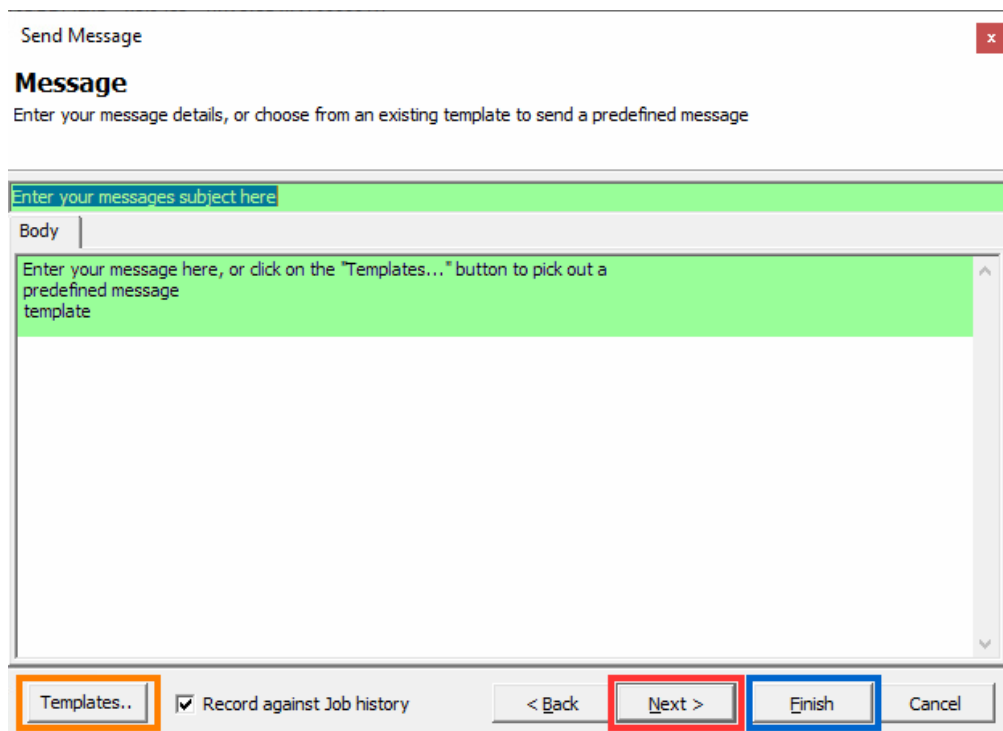
FM3 can use Outlook to send reports via email. Locate and click the **'envelope'** icon in the top toolbar, select **'Email (via internet)'** and press 'Next'.



Open Job > Email Icon



Open Job > Email > 'Send Message' Pop-Up > Select Email



Open Job > Email > 'Send Message' Pop-Up > Create Email Content.

Here the email **subject and body** can be edited. **Email templates** (see the following [section](#)) are also accessible from this menu. By clicking '**Next**' you are taken to an address page where the **recipient's email** can be added. Alternatively, you could press '**Finish**' from this screen and be taken to a 'New Message' page in Outlook (or a similar PC email application).

Send Message

Who do you want to send the message to?

You can now determine who is to receive your message. You can select more than one recipient for your message by adding them to the "To" list

Send to (from job) Send To (address code)

Client CUPPB

Contact	Email	Telephone
{MAIN CONTACT}	general@cupboardglob.C...	02001111697

Send To the following:

Address

☒ Record against Job history

< Back **Next >** Finish Cancel

Open Job > Email > 'Send Message' Pop-Up > Email Send To

Send Message

Options

These are optional features for your message, you do not need to select any of them in order for your message to be sent.

Attached To Job Manual File Attachment

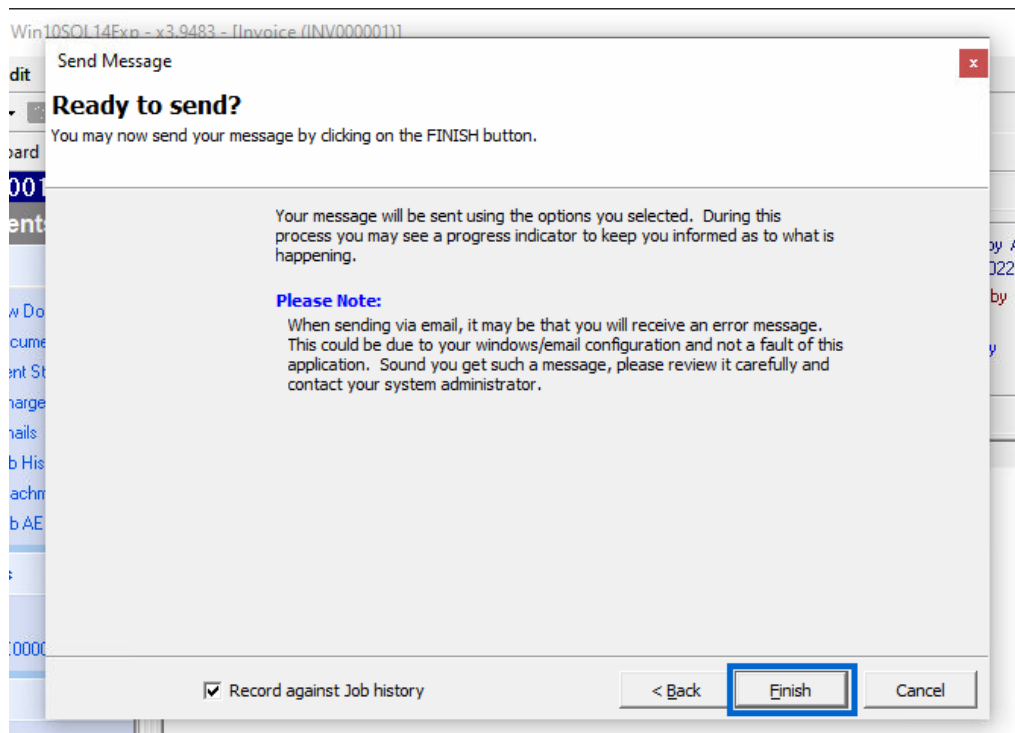
File Name	File Type
<input type="checkbox"/> ClientRemoteAccessLoginDetails.pdf	PDF
<input type="checkbox"/> Mona-Lisa.jpg	Image

☒ Record against Job history

< Back **Next >** Finish Cancel

Open Job > Email > 'Send Message' Pop-Up > Attachment Options

Another click of the 'Next' button will show an attachments page, from which external **attachments added to an FM3 job** can be included in the current email output.

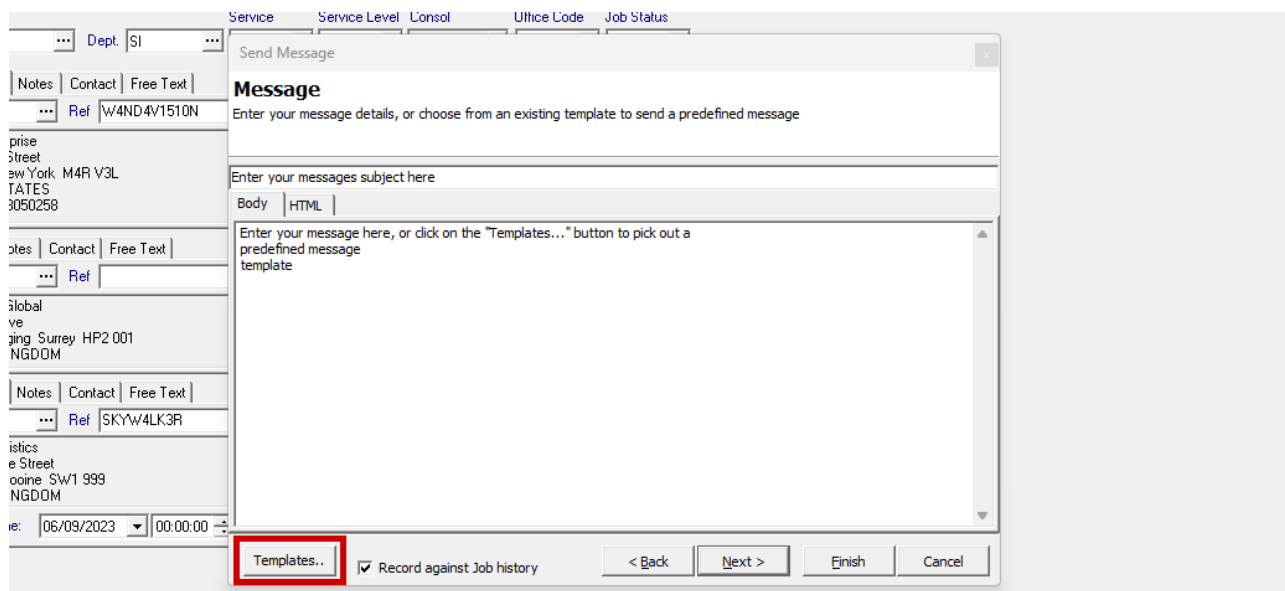


Open Job > Email > 'Send Message' Pop-Up > Final Confirmation

Finally, the only option will be to click **'Finish'** and be transported to an Outlook message.

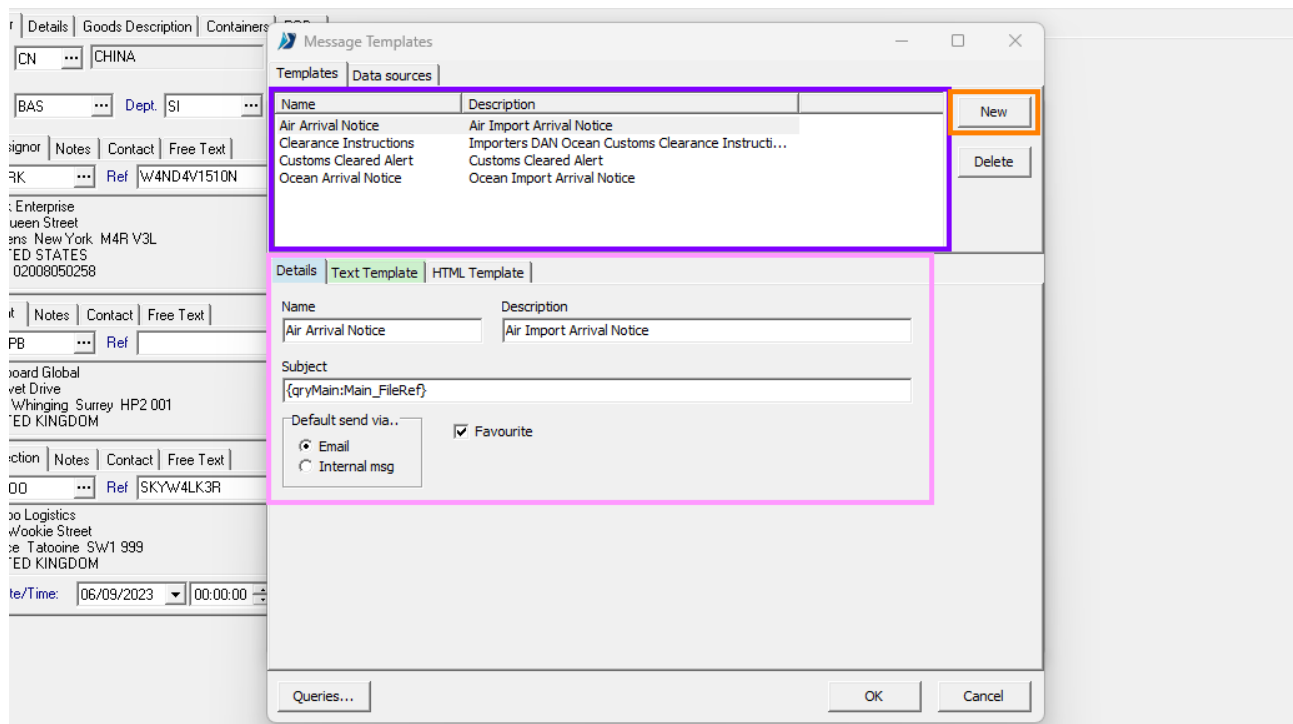
Email Templates

Templates contain pre-made subjects and bodies of text for an email. Within FM3, these are stored under the **'Templates'** button.



Open Job > Email > 'Send Message' Pop-Up > Create Email Content > Templates

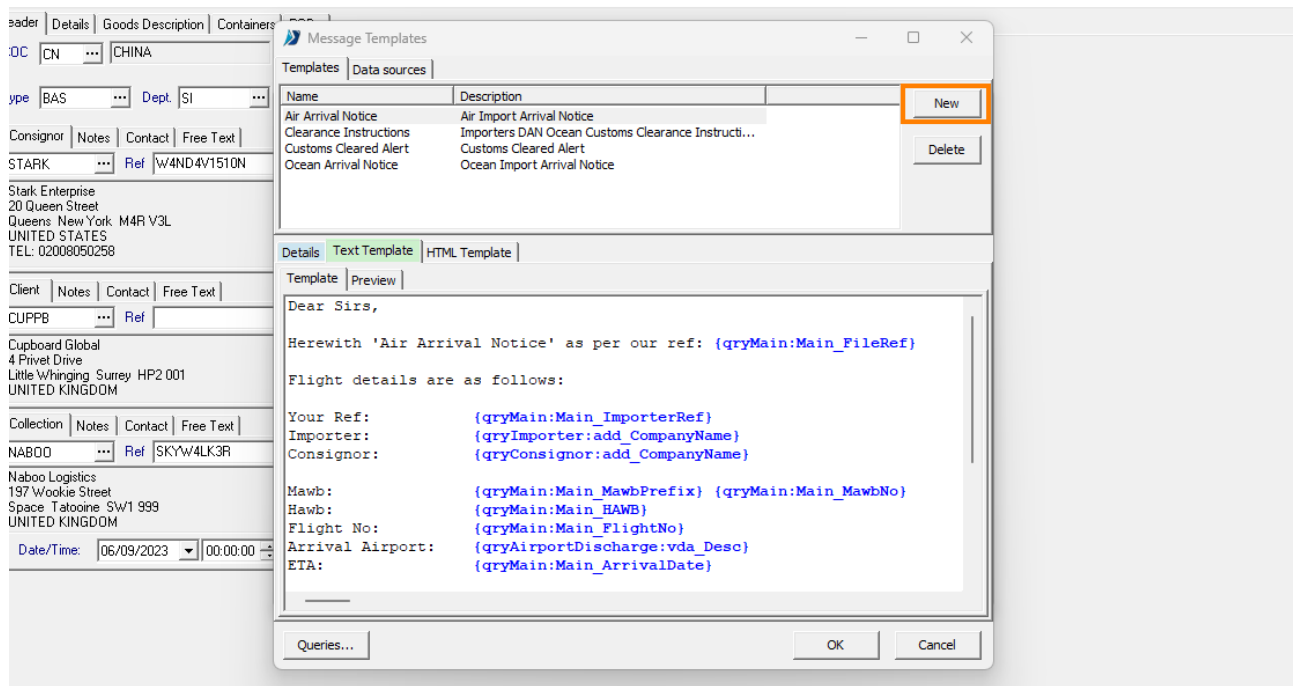
Multiple templates can be stored in FM3.



Create Email Content > Templates

Selecting a template will bring up the internal Name and Description, as well as the Subject to be used in the final email, under the **Details** tab.

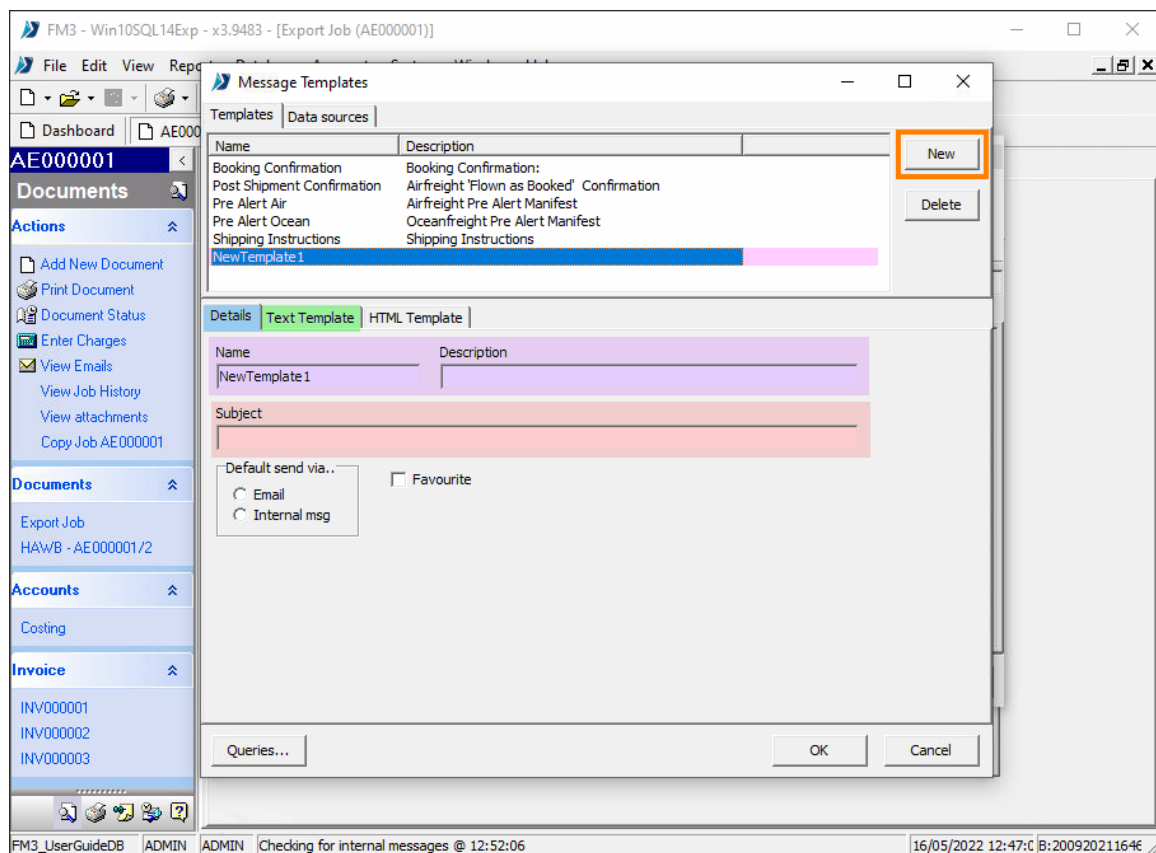
Text Template is a separate tab containing the body of text attached to the template. This will be what is pulled through into the body of the final email.

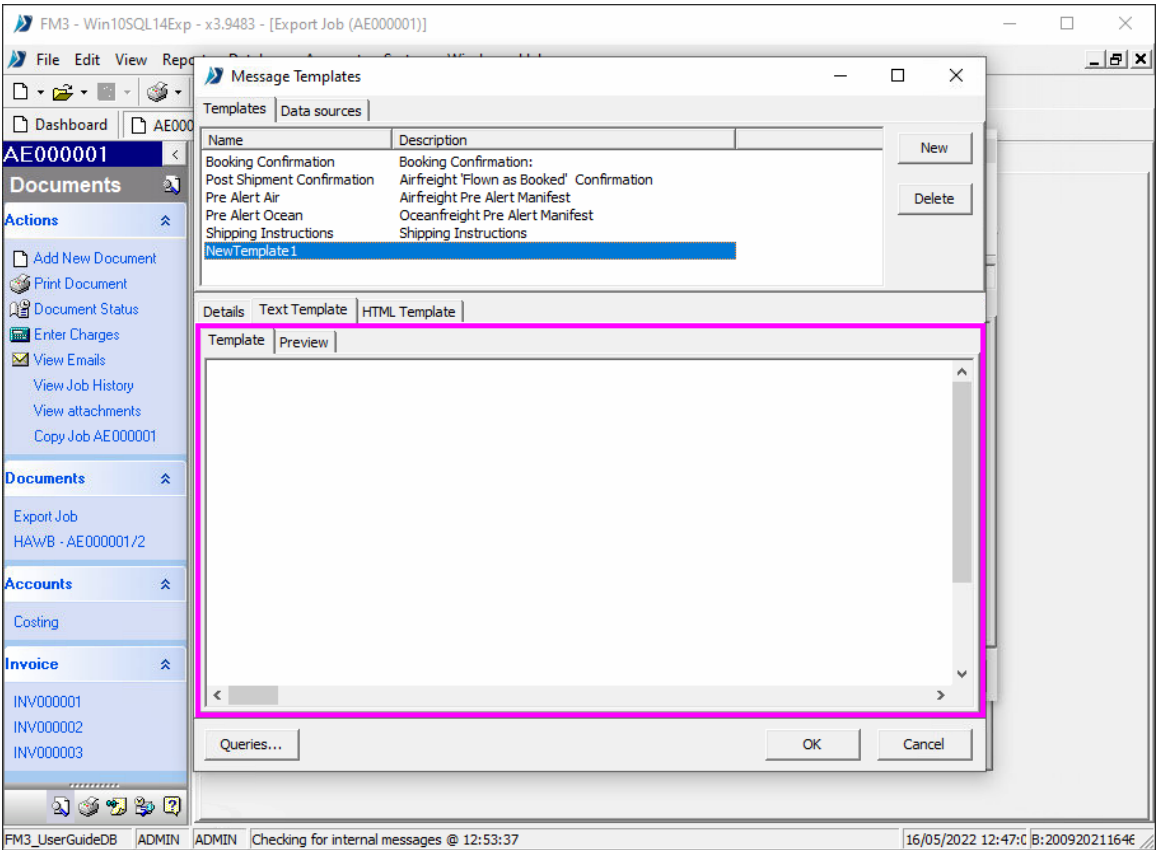


Create Email Content > Templates > Text Template Tab

To add FM3 job information (such as Invoice Ref or Client Name) please email Sigma Support.

Add a new template with the **'New'** button. This will create a **new entry** in the list of templates with the same fields as regular templates, but these will be empty.





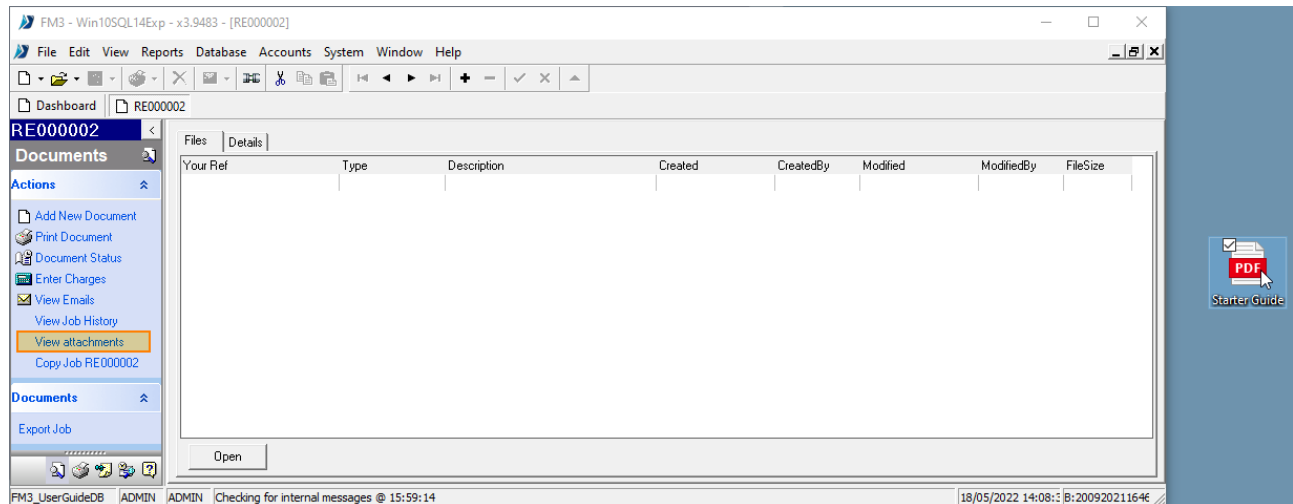
Details	Tab which holds basic fields regarding the template.
Name/ Description	Name and description of the template for internal storage.
Subject	Information to be extracted as the subject of the final email.
Text Template	This tab holds the body of the email template.
Template	Text to be extracted into the final body of the email.

DRAGGING ATTACHMENTS

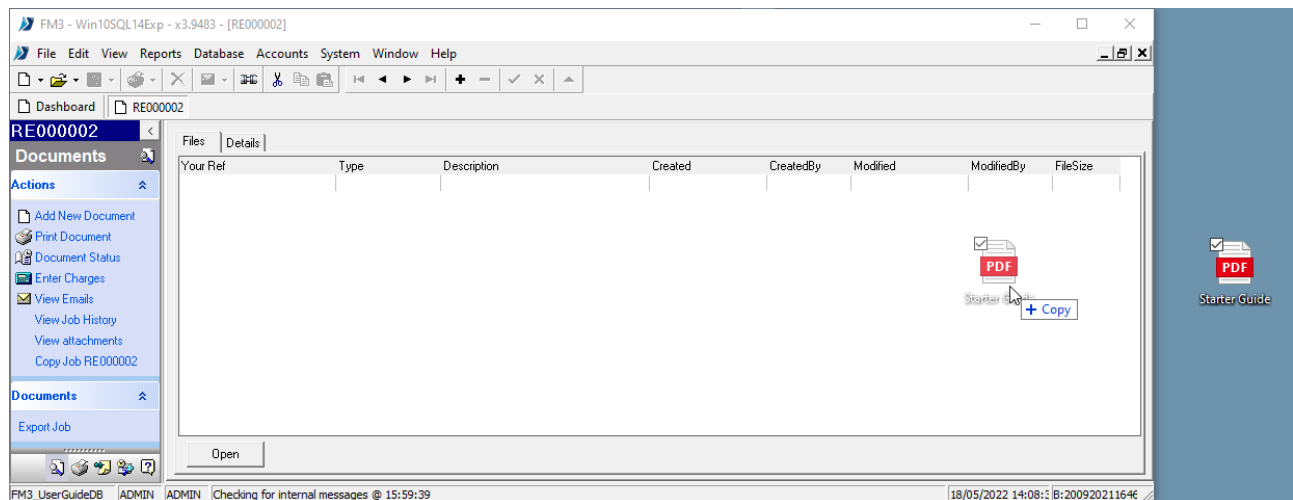
External documents and emails can be added to FM3 jobs by dragging them from your PC.

Documents

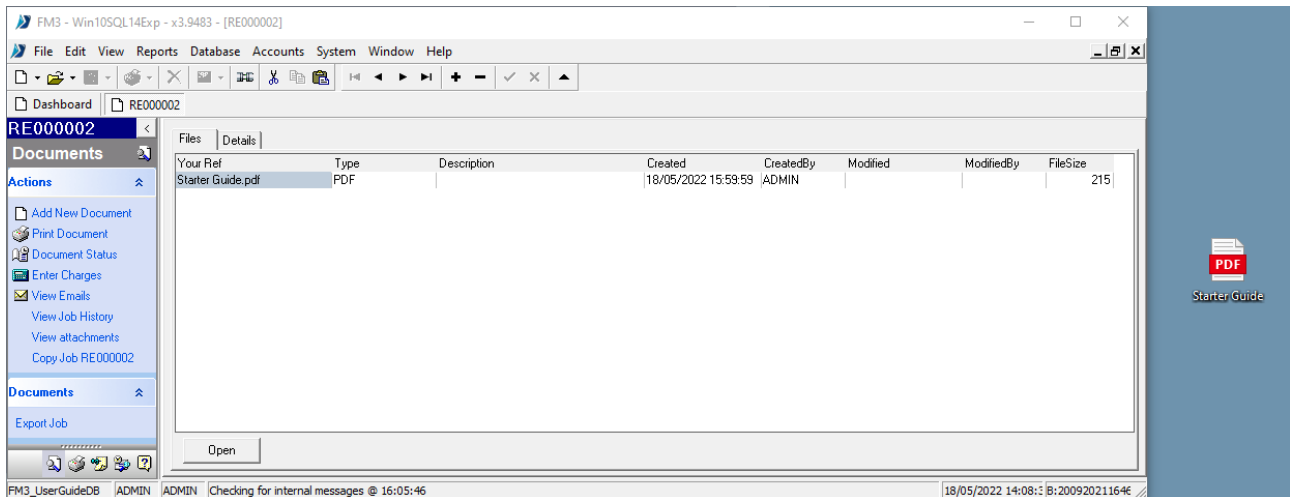
Open the job and press **'View Attachments'**. From here, click the document you want to add and drag it across into the empty Files tab.



FM3 With The Attachment On Desktop.



FM3 With The Attachment Being Dragged Across To The Attachments Page Within An FM3 Job.

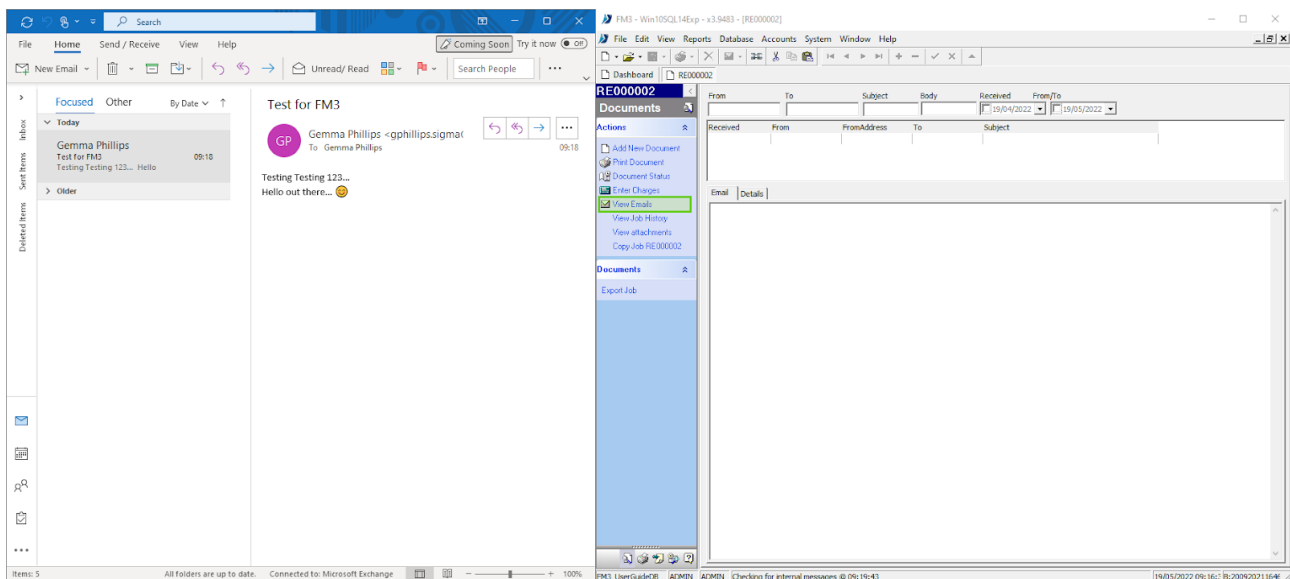


FM3 With The Attachment Added To The Attachment Page Within An FM3 Job.

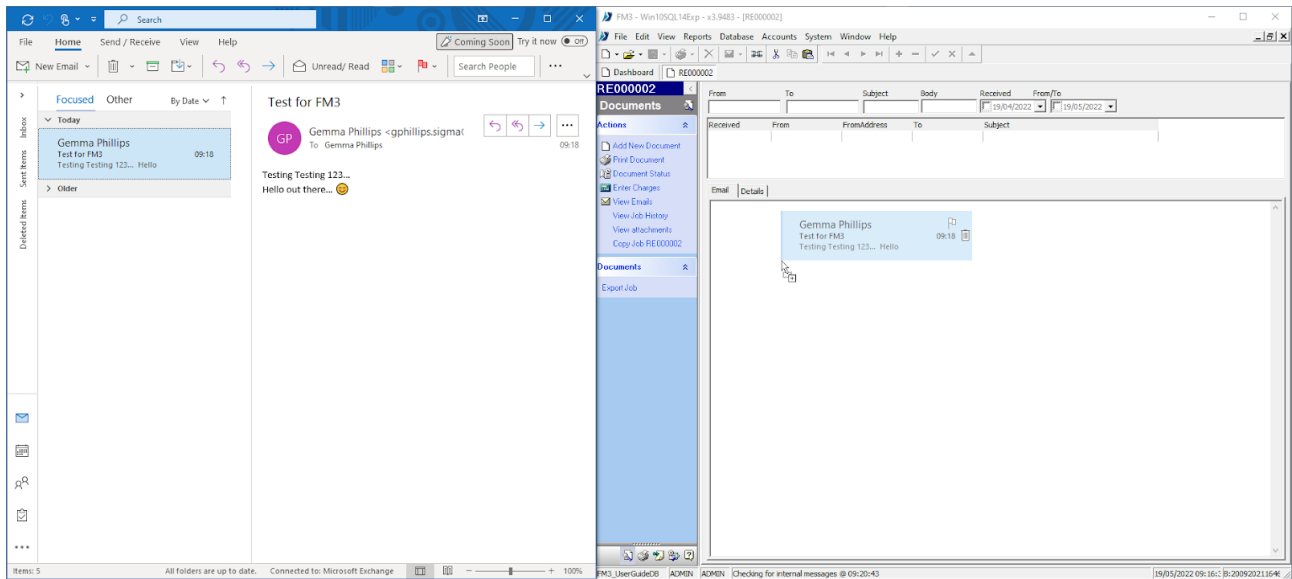
Once let go, the document information will show in the files tab, as seen above.

Emails

Attaching emails to jobs will use the same process with slight differences: Emails are to be dropped into the '**View Emails**' page, not attachments and Outlook should be used to drag these emails.

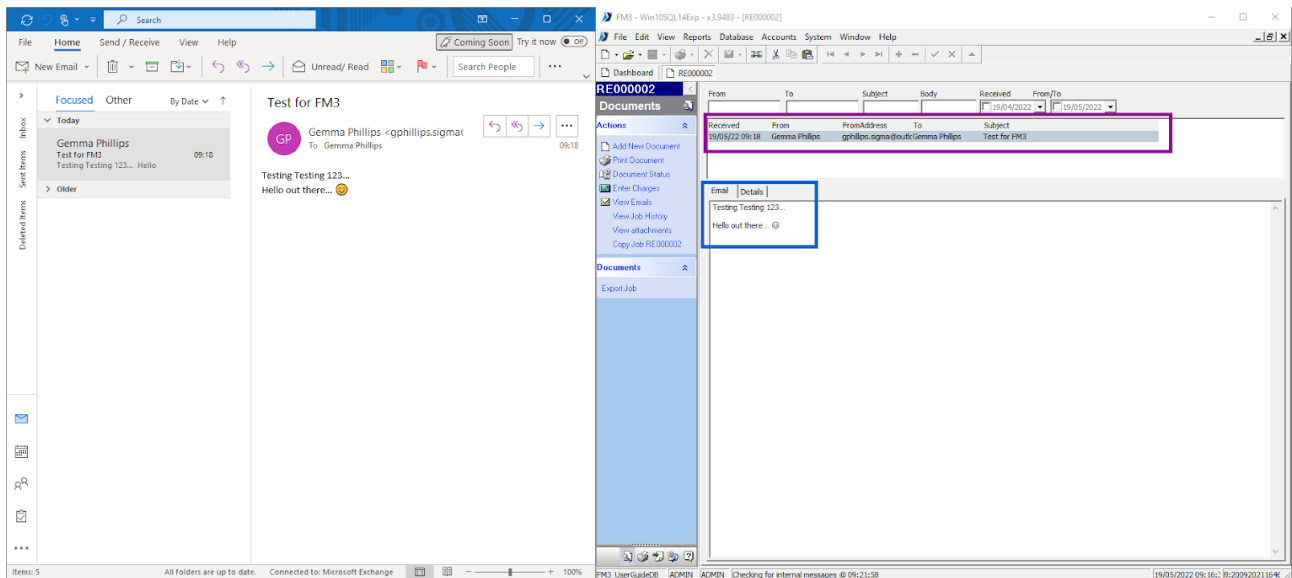


Outlook Open Next To FM3



Email From Outlook Dragged Into The Email Page Within An FM3 Job

Select the email to move over, hold down the click, drag to FM3 and drop (let go).

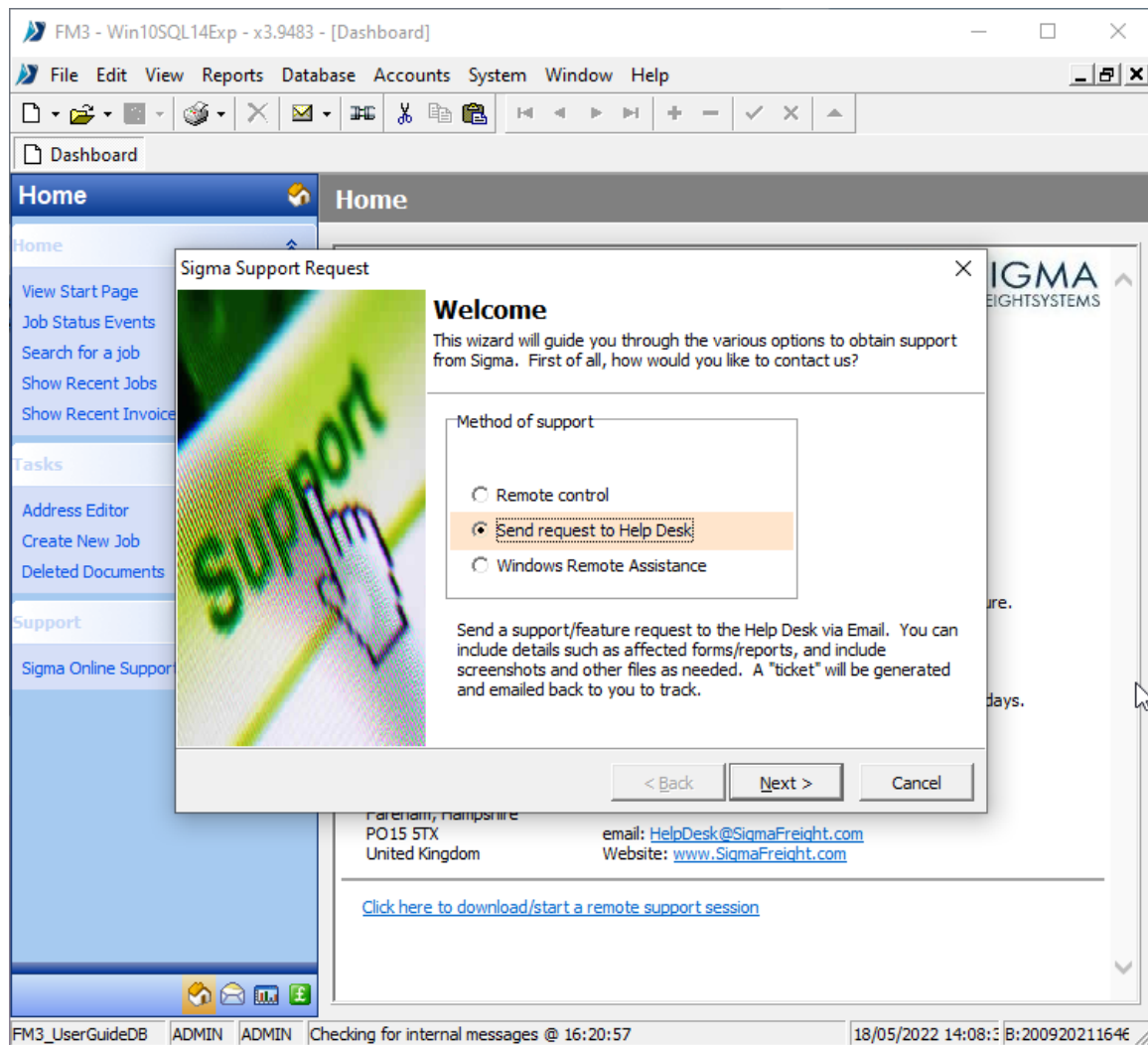


Email From Outlook Attached To The Email Page Within An FM3 Job

Emails will now show against the job with **information** stored in the top box and the **contents** below.

RAISING A SUPPORT TICKET

You are always welcome to email or phone us directly, however, FM3 has a support feature which will send an email (to support) straight from the application. Press F12, ensure '**Send request to Help Desk**' is selected and click Next.



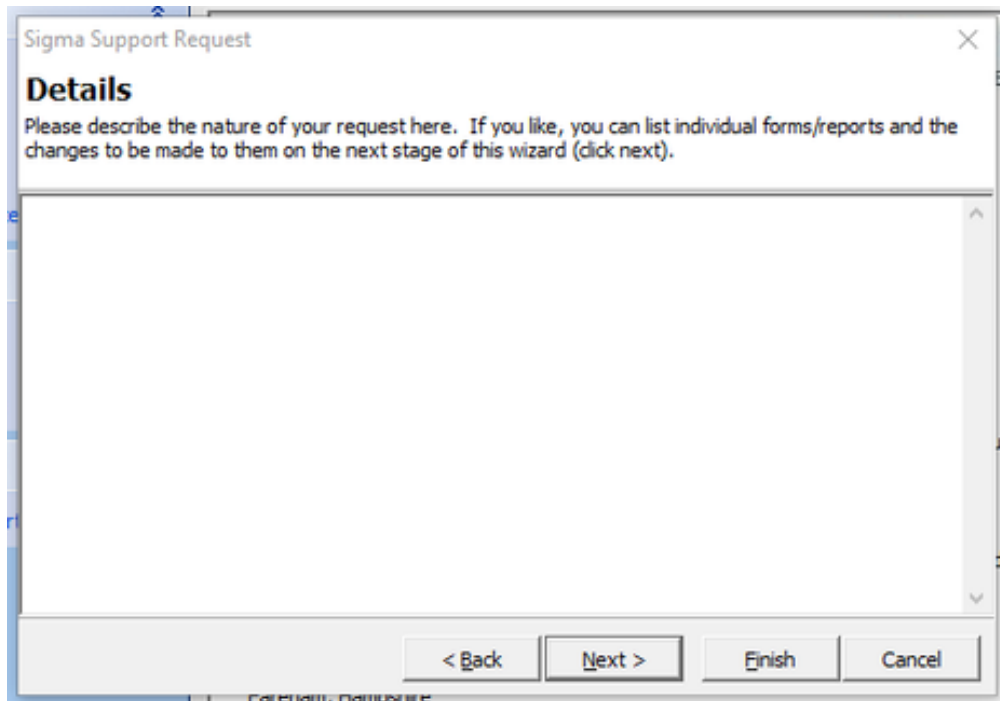
F12 > Sigma Support Request Window

Sigma Support Request Window > Identification

The following screen will ask for credentials, we mainly need **'email'**, **'name'** and **'subject'** to contact you regarding the ticket. Fill out your information and click Next.

Priority will be the next screen, in which you can specify the urgency and benefit of the request. This section is not necessary.

Sigma Support Request Window > Priority

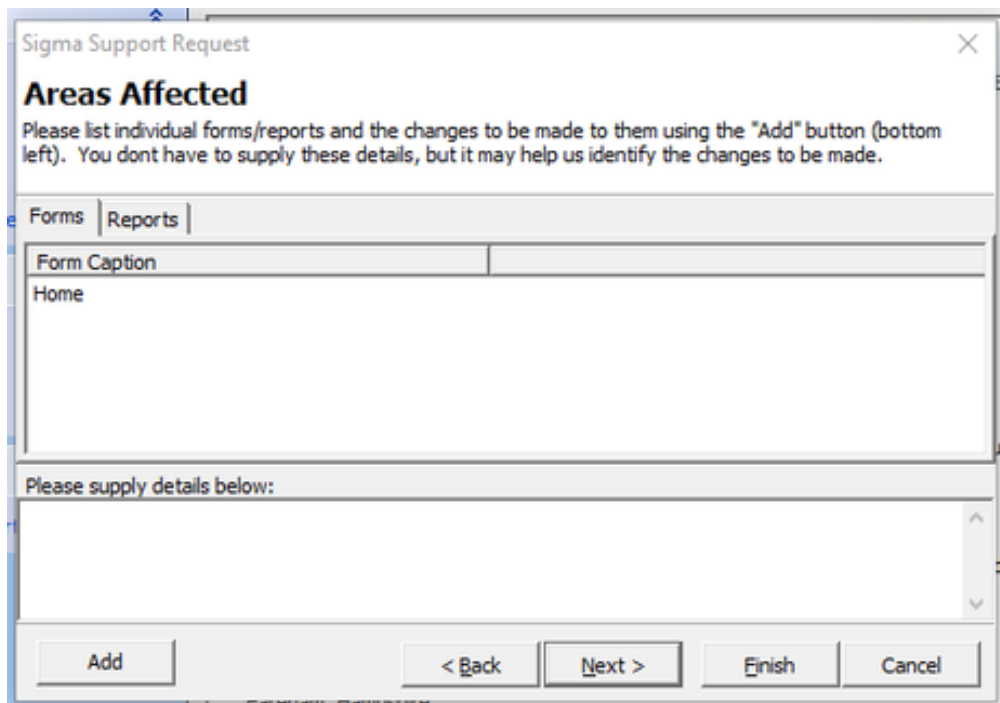


The screenshot shows the 'Sigma Support Request' window with the 'Details' tab selected. The window has a title bar with a close button. Below the title bar, the text 'Please describe the nature of your request here. If you like, you can list individual forms/reports and the changes to be made to them on the next stage of this wizard (click next).' is displayed. A large text area for input is below this text. At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Sigma Support Request Window > Details

The details page is the body of the email, here explain what is going on and what steps you have taken to get there.

'Areas Affected' relates to the specific areas of FM3 in question, this is not explicitly needed but might speed up the process as support will know where to start looking.

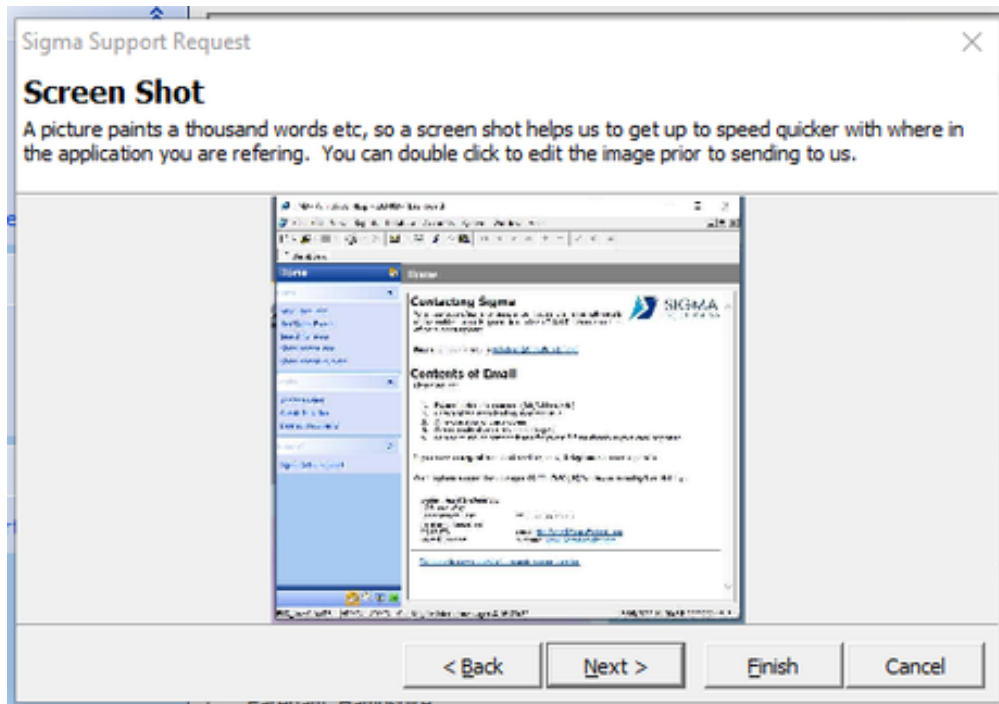


The screenshot shows the 'Sigma Support Request' window with the 'Areas Affected' tab selected. The window has a title bar with a close button. Below the title bar, the text 'Please list individual forms/reports and the changes to be made to them using the "Add" button (bottom left). You dont have to supply these details, but it may help us identify the changes to be made.' is displayed. Below this text, there are two tabs: 'Forms' and 'Reports'. The 'Forms' tab is active, and it contains a table with the following structure:

Form Caption	
Home	

Below the table, there is a text area with the label 'Please supply details below:'. At the bottom of the window, there are five buttons: 'Add', '< Back', 'Next >', 'Finish', and 'Cancel'.

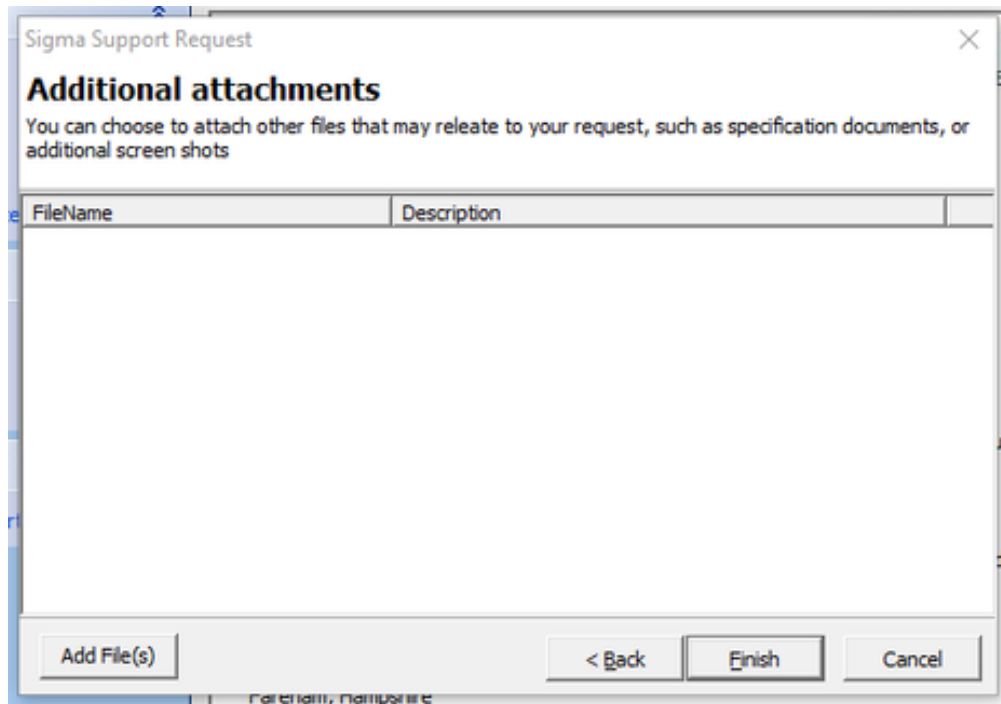
Sigma Support Request Window > Areas Affected



Sigma Support Request Window > Screenshot

A screenshot will be taken showing the screen behind the Support Request Window, this will be attached to the final email sent to Support. Screenshots help us to understand what was happening and where to go to find a solution.

Finally, additional attachments can be uploaded, we would recommend taking additional screenshots or creating an example (in cases where a new report or template is to be made) to convey the information visually.



Sigma Support Request Window > Additional Attachments

ADDITIONAL HELP

If you need additional guidance, please get in touch with us via email or telephone.

Tel: +44 (0) 330 223 5813

Email: helpdesk@sigmafreight.com

Website: <https://www.sigmafreight.com/support/>
