

# FM3 Basics User Guide

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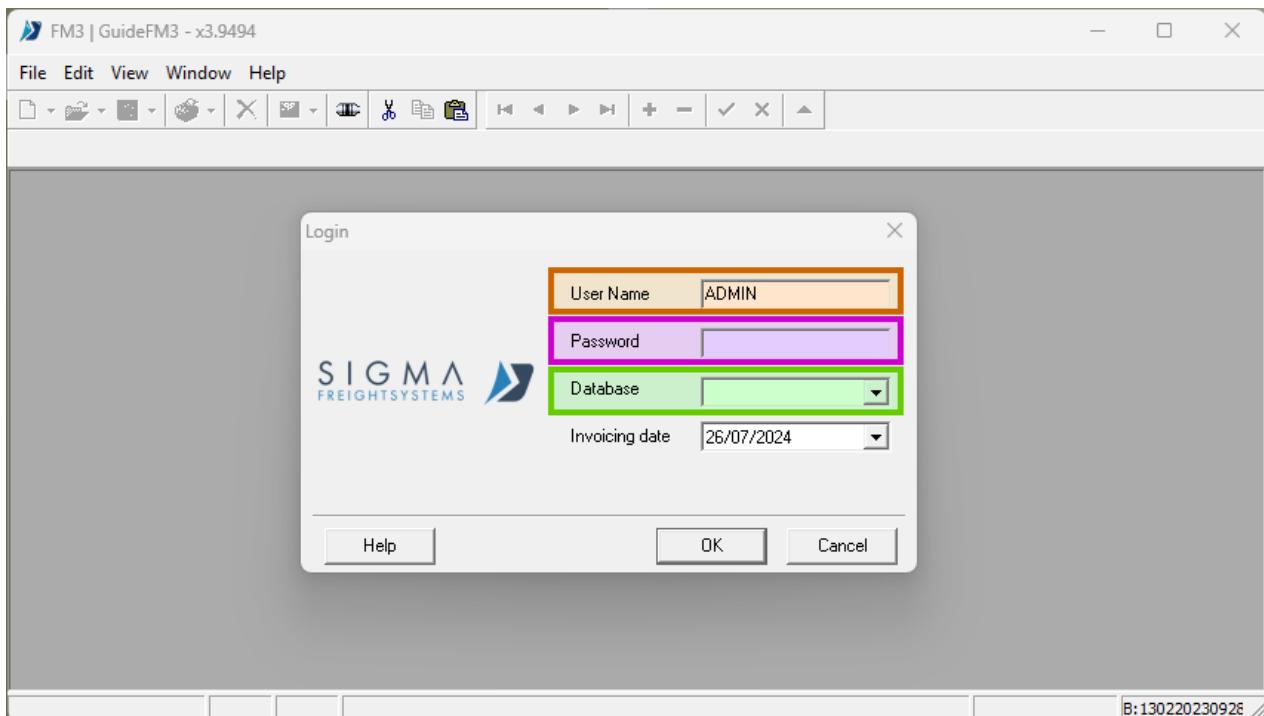
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## KEY POINTS

- 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.



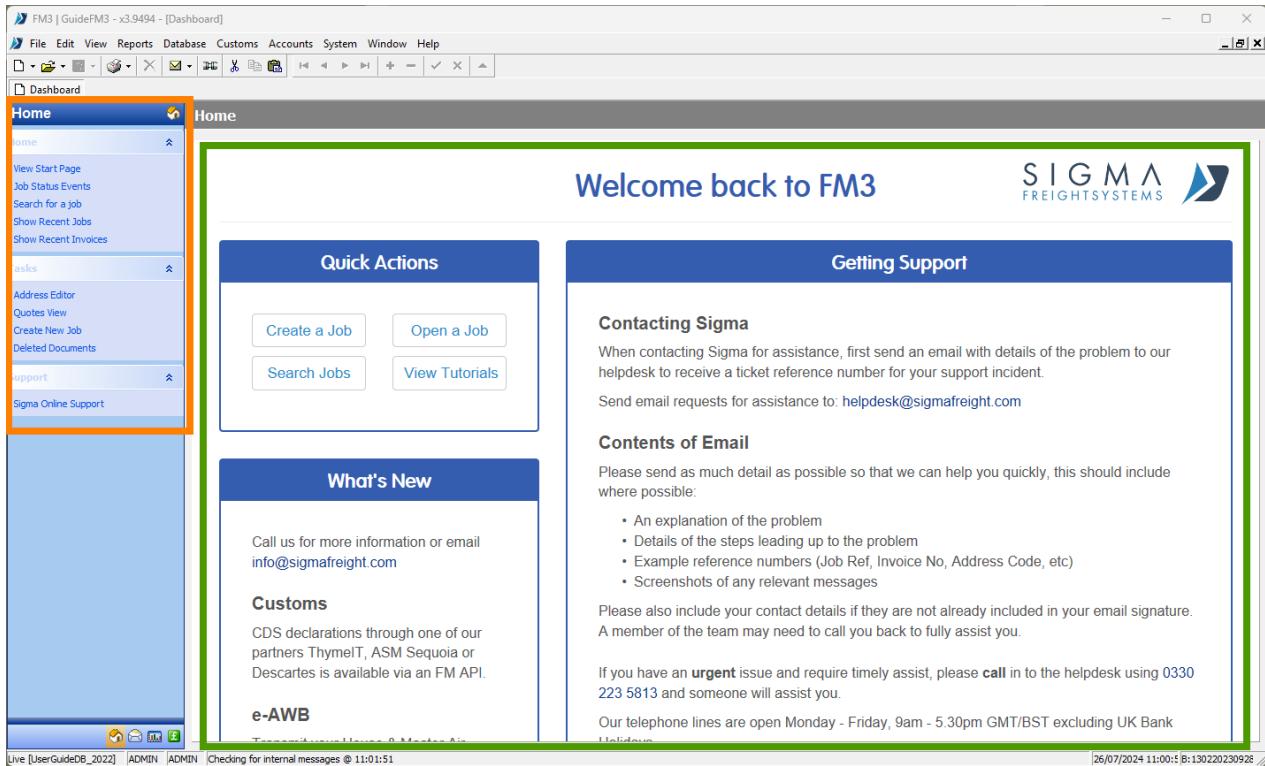
FM3 > Login

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

## MENUS

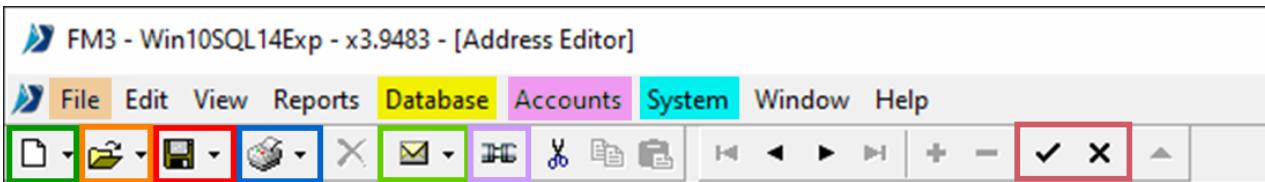
Once logged in the FM3 Dashboard will load, this contains **links to key pages** to the left and **information** on the right.

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FM3 > Dashboard

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



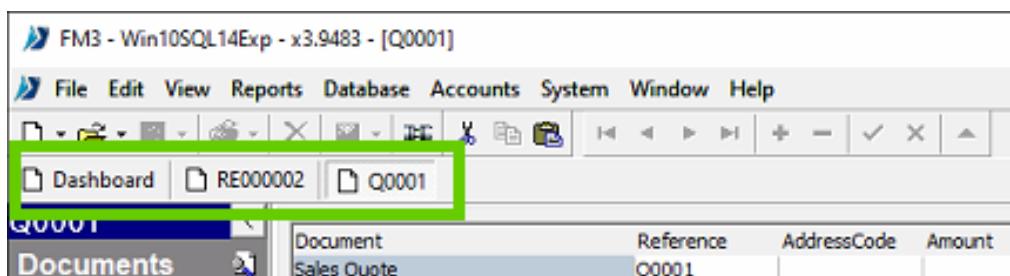
FM3 > Toolbar

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

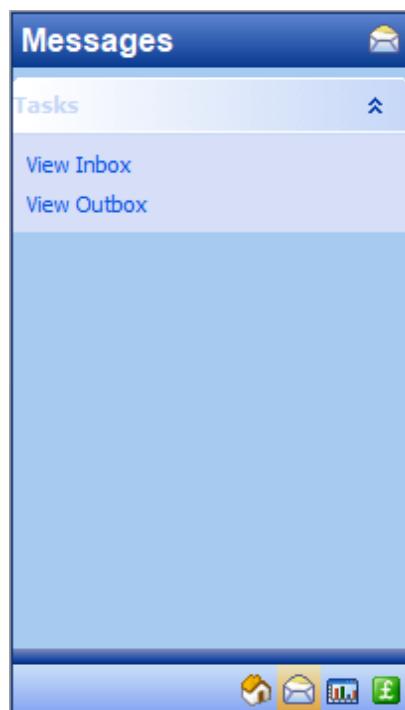
When in the main 'Home' dashboard, **icons to other dashboard pages** reside beneath the linked taskbar.

These are:

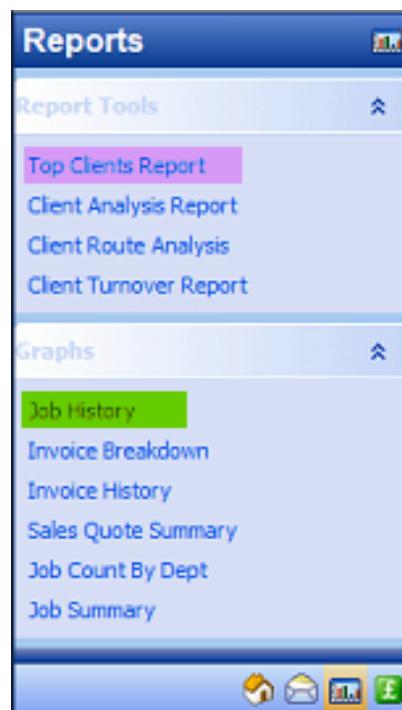
- **Home**, represented by a house.
- **Messages**, found under the envelope button.
- **Reports**, shown as a graph, holds multiple summary tools to visually show FM3 reports (such as **Top Clients** and **Job History**)
- **Financial Tools**, located through the '£' icon, provides insights into financial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



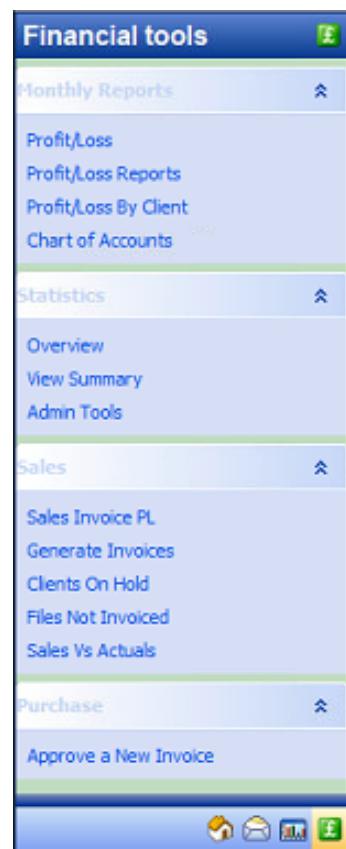
FM3 &gt; Dashboards



FM3 &gt; Messages Dashboard



FM3 &gt; Reports Dashboard



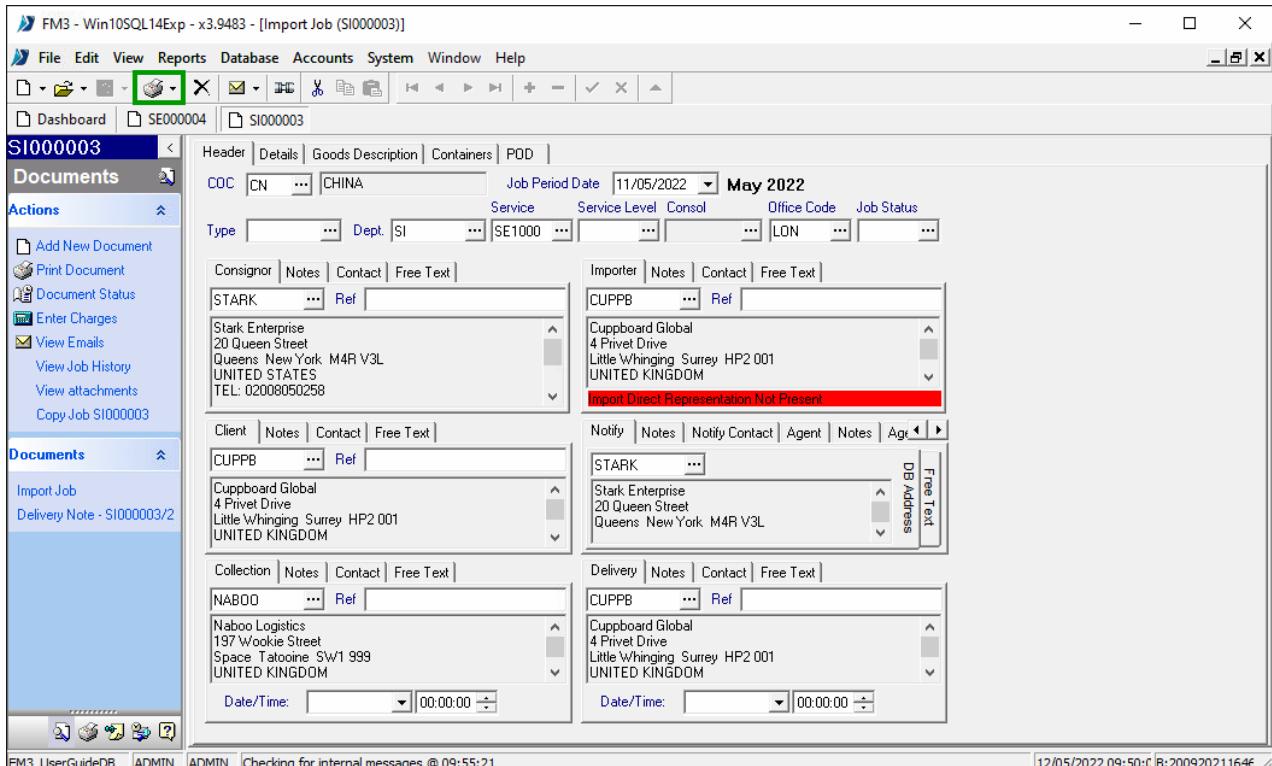
FM3 &gt; Financial Tools Dashboard

## 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.

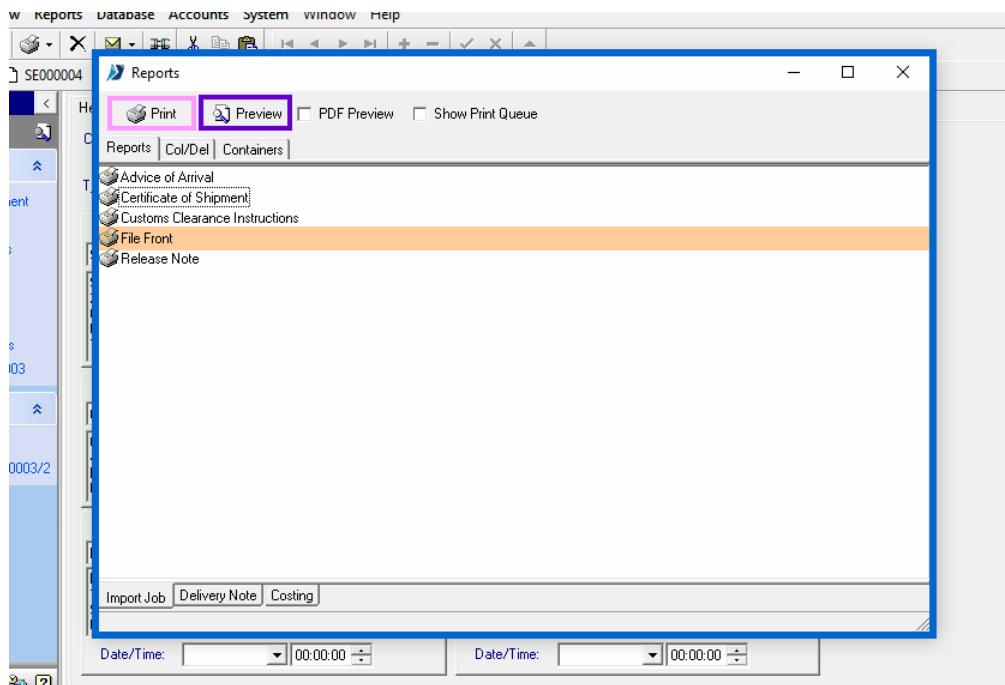
### Print

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'.



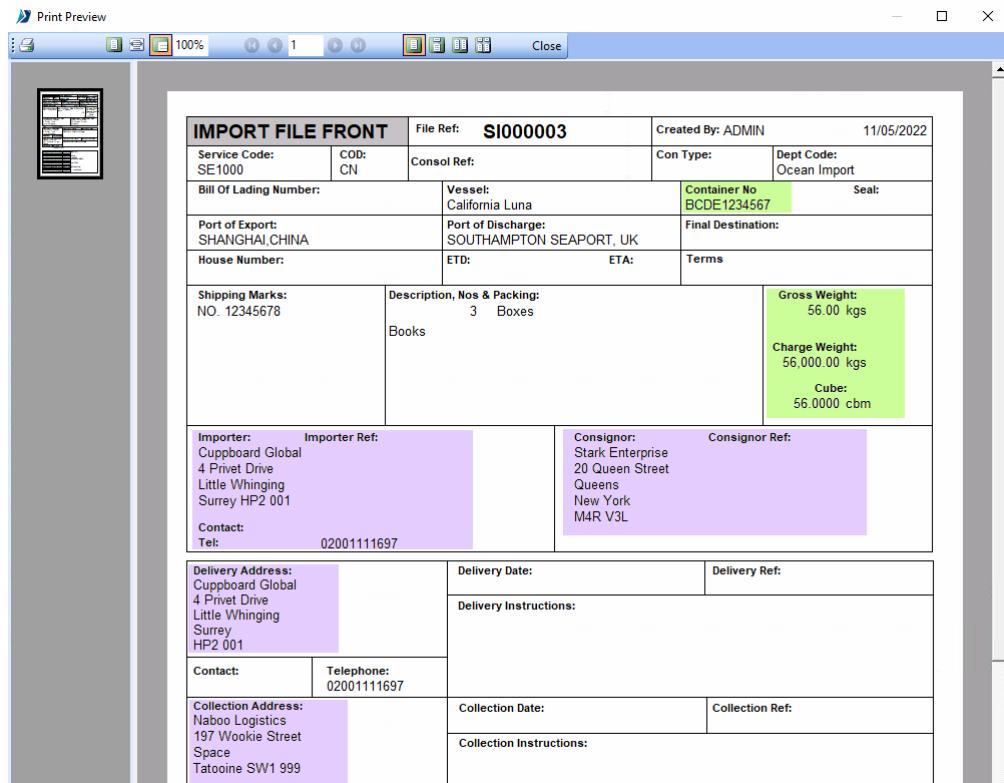
FM3 > Open Job > Print Icon

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**.

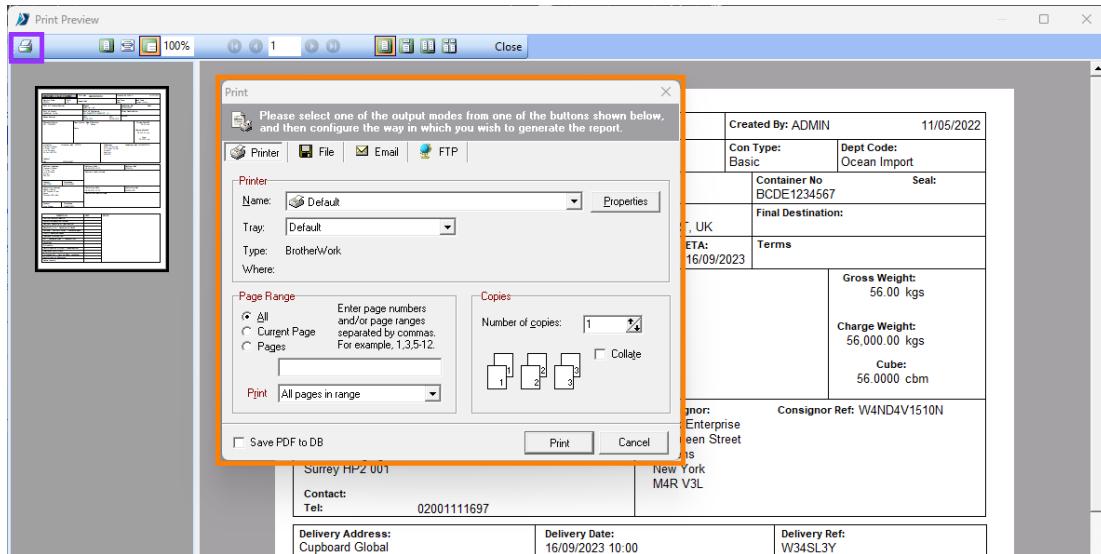


FM3 &gt; Open Job &gt; Print Reports Screen

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.



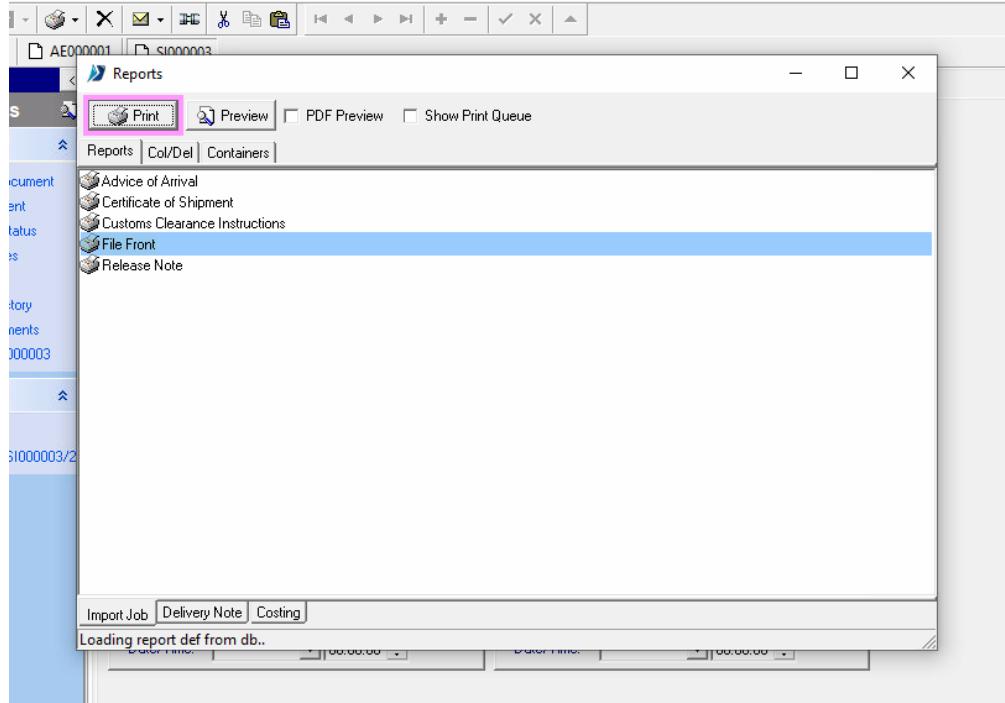
Open Job &gt; Print &gt; Select Report &gt; Print Preview



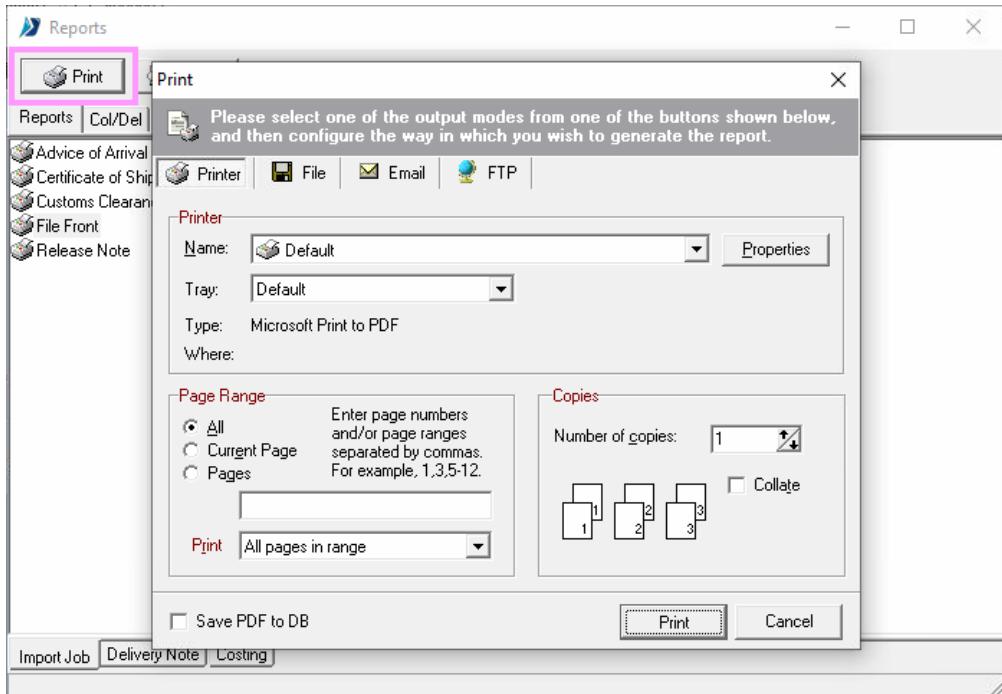
Open Job &gt; Print &gt; Select Report &gt; Print Preview &gt; Print Pop-Up

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'.



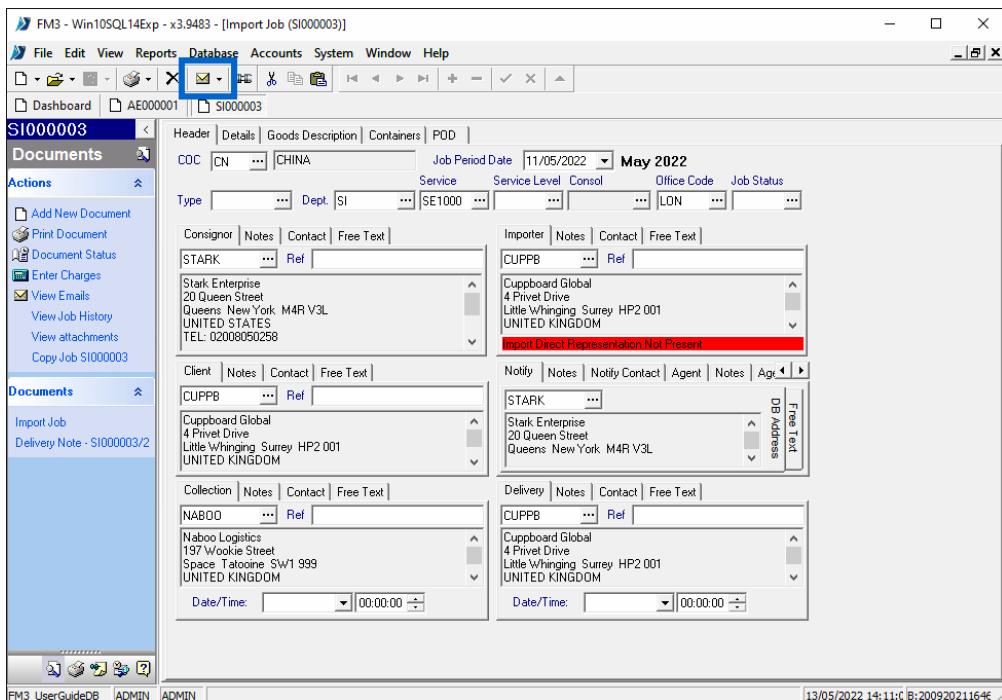
Open Job &gt; Print &gt; Select Report &gt; Print Icon



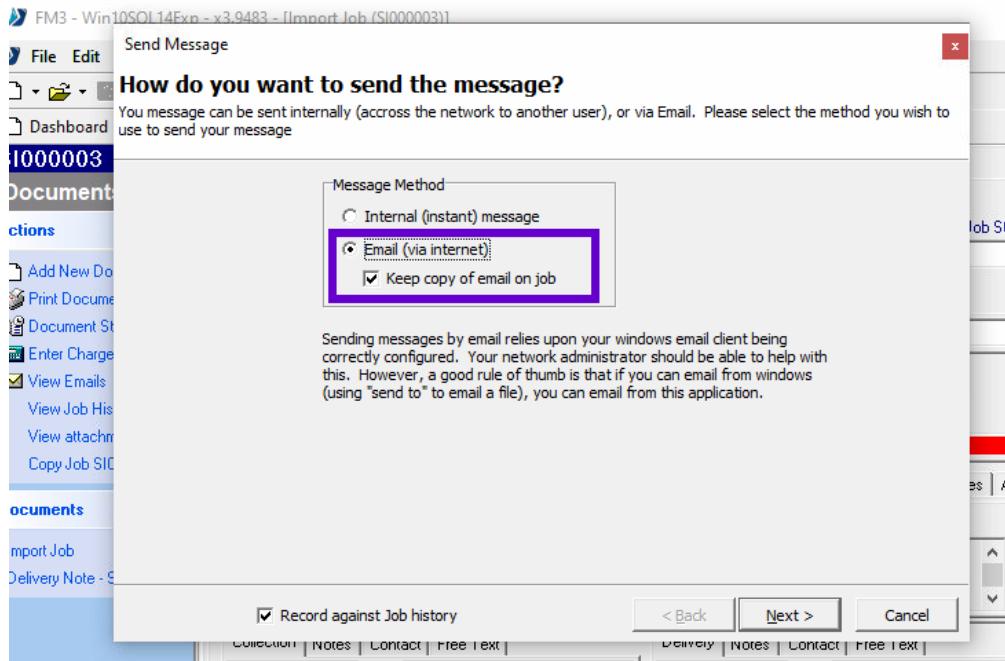
Open Job &gt; Print &gt; Select Report &gt; Print Pop-Up

## Email

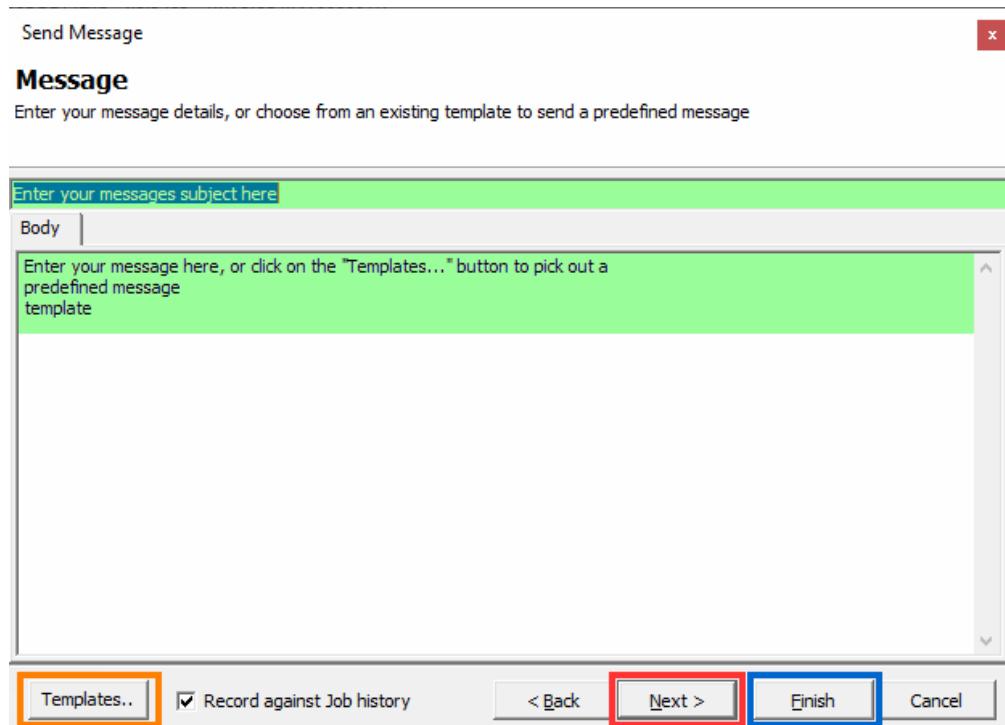
FM3 can use Outlook to send reports via email. Locate and click the 'envelope' icon in the top toolbar, select 'Email (via internet)' and press 'Next'.



Open Job &gt; Email Icon

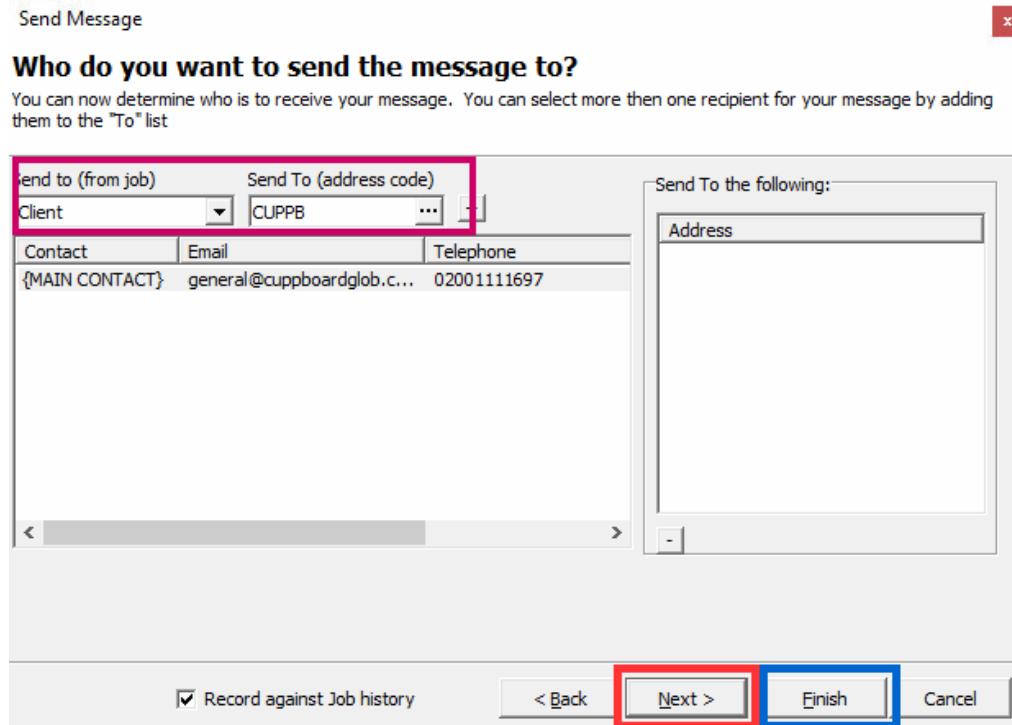


Open Job &gt; Email &gt; 'Send Message' Pop-Up &gt; Select Email

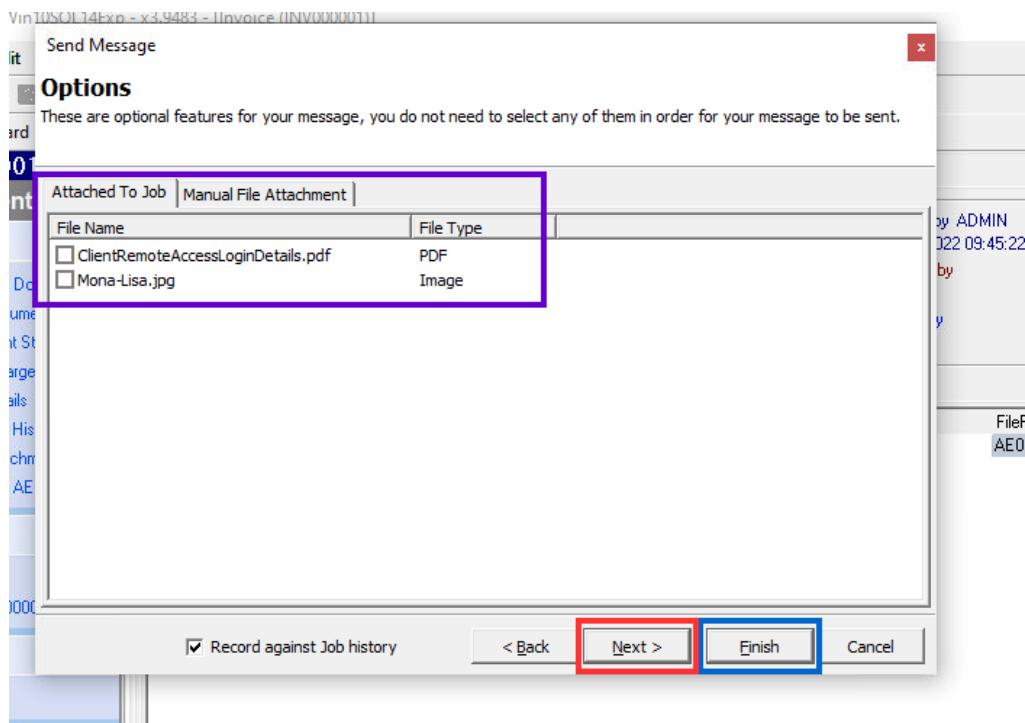


Open Job &gt; Email &gt; 'Send Message' Pop-Up &gt; Create Email Content.

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).

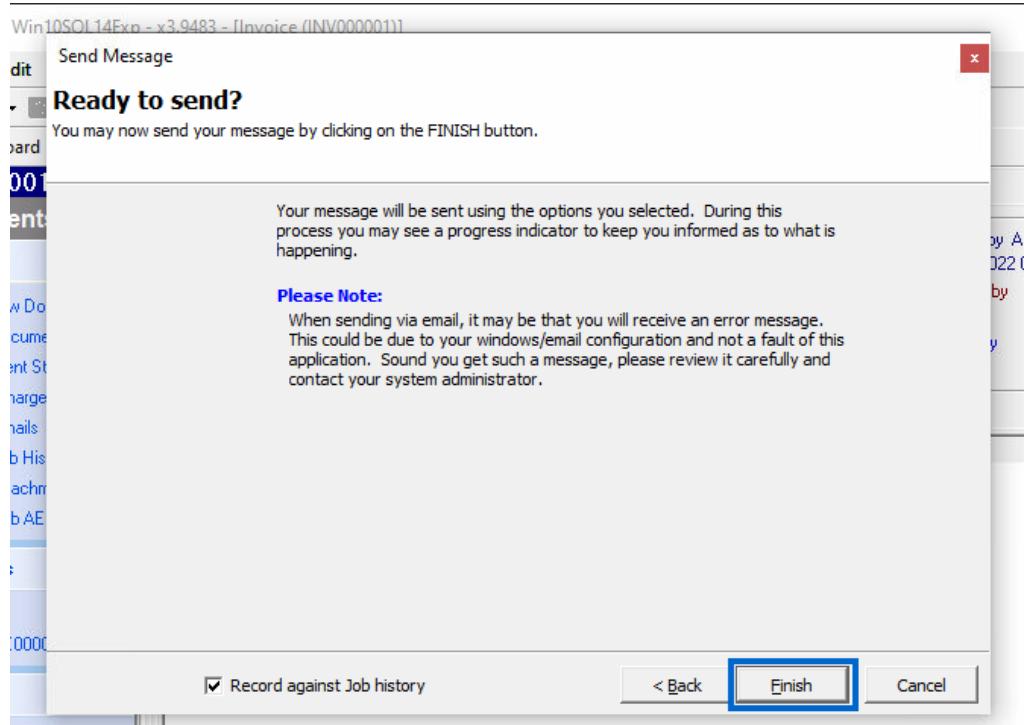


Open Job &gt; Email &gt; 'Send Message' Pop-Up &gt; Email Send To



Open Job &gt; Email &gt; 'Send Message' Pop-Up &gt; 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.

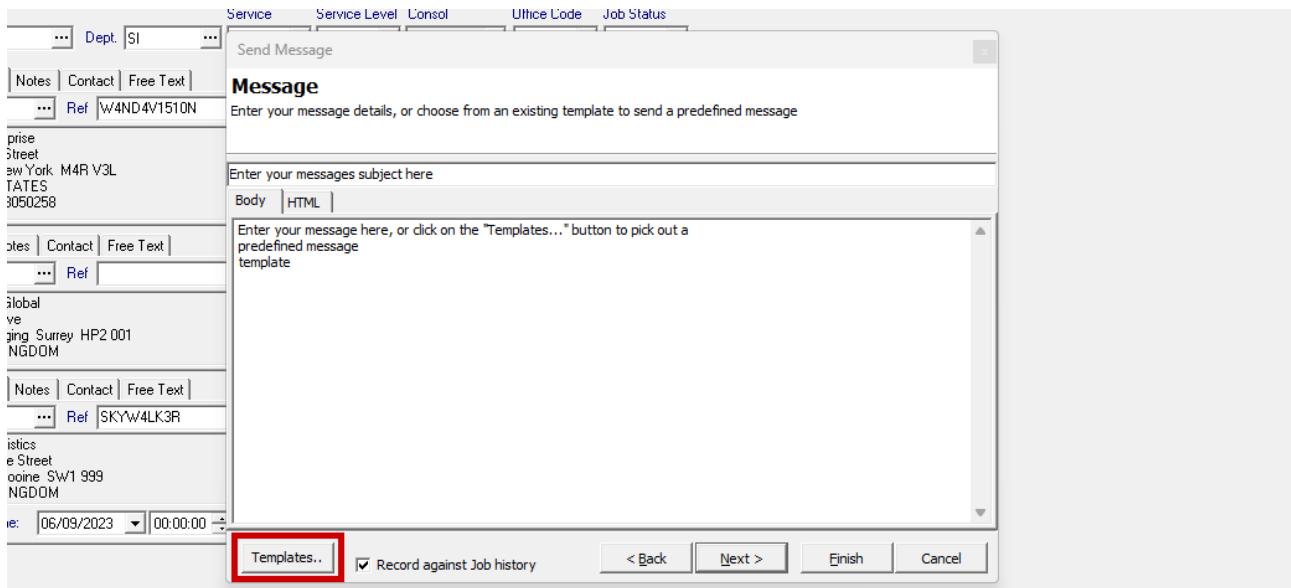


Open Job > Email > 'Send Message' Pop-Up > Final Confirmation

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

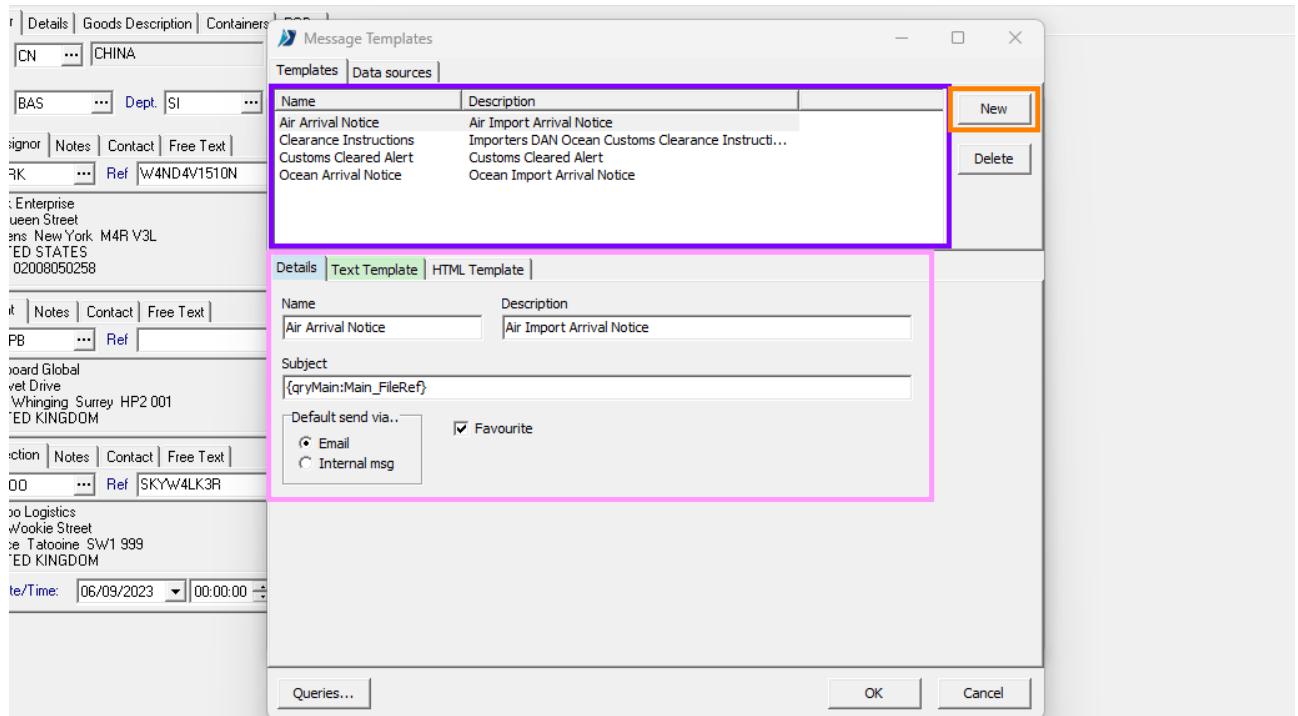
## Email Templates

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

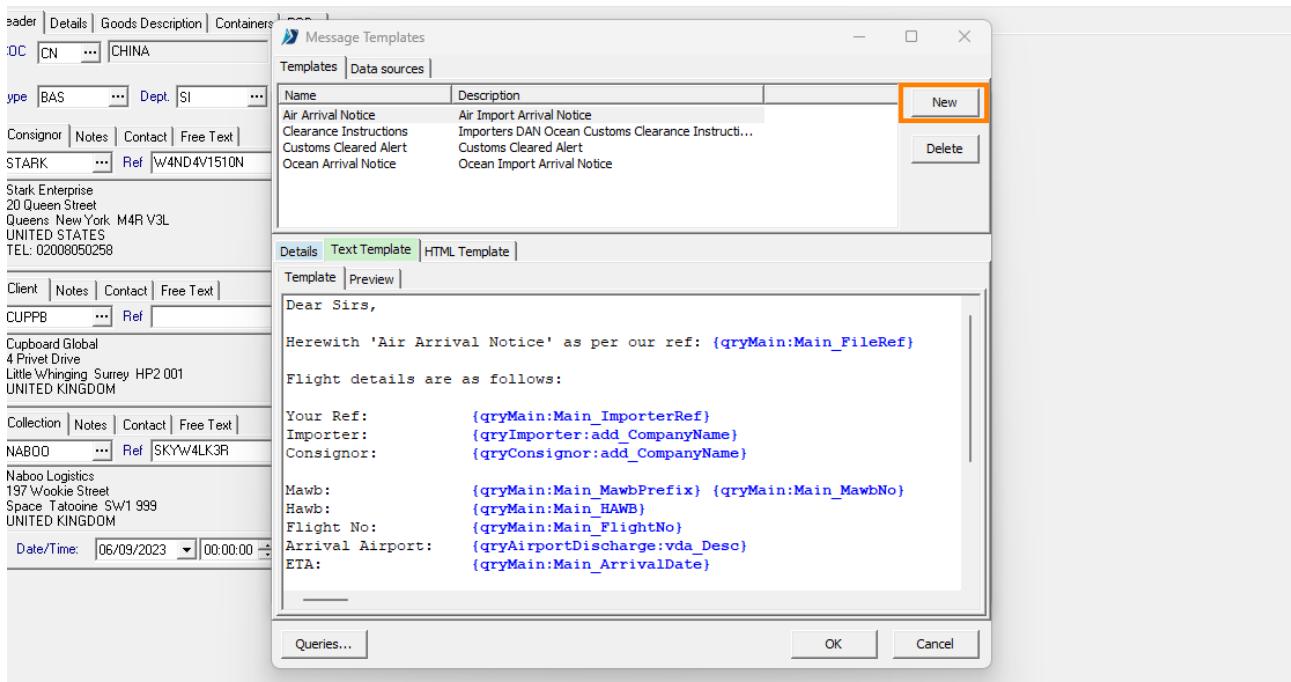
**Multiple templates** can be stored in FM3.



Create Email Content &gt; 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.

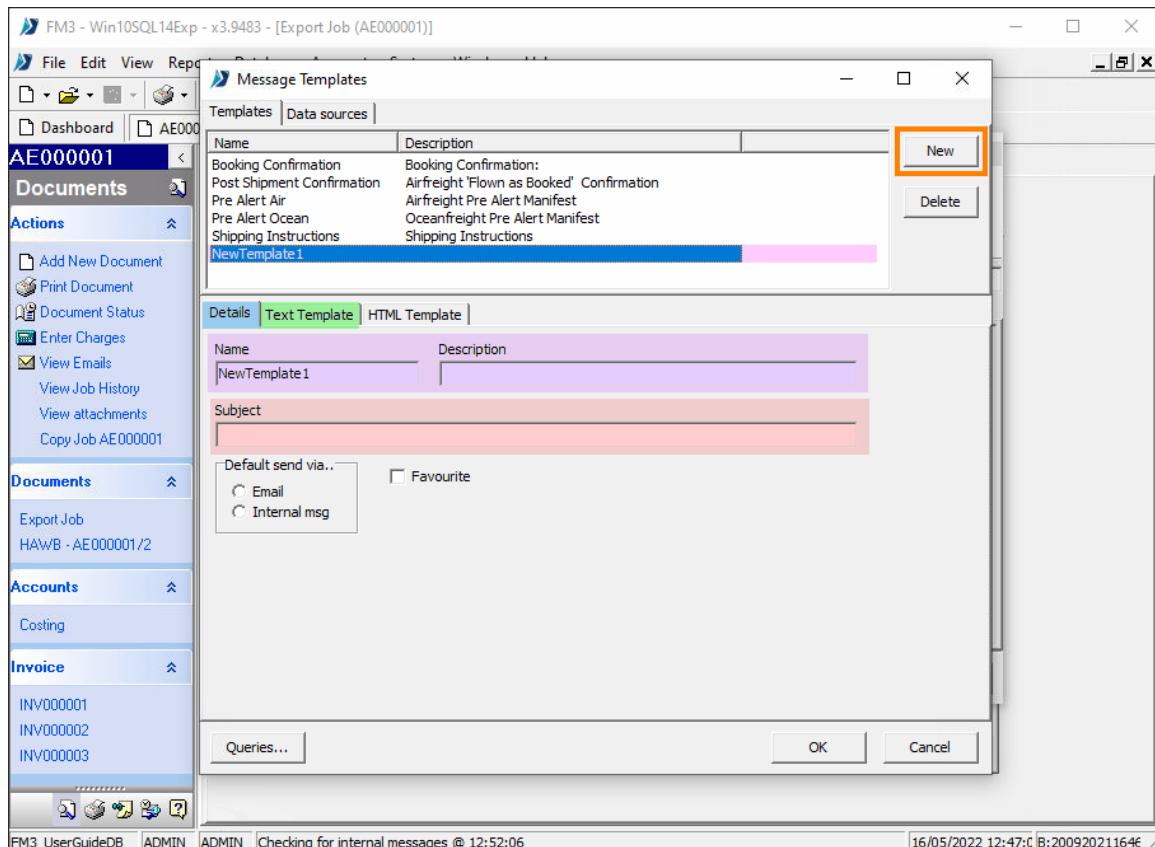
**Text Template** is a separate tab containing the body of text attached to the template. This will be what is pulled through into the body of the final email.

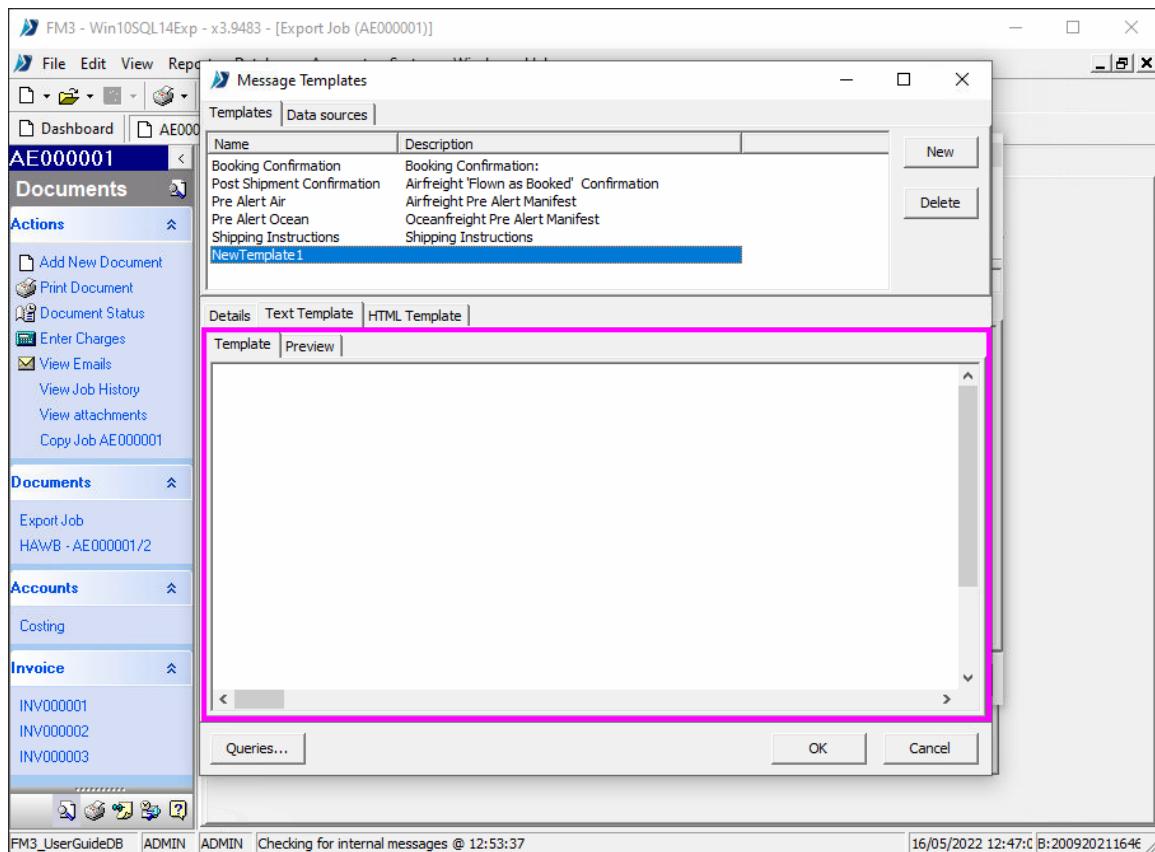


### Create Email Content > Templates > Text Template Tab

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.





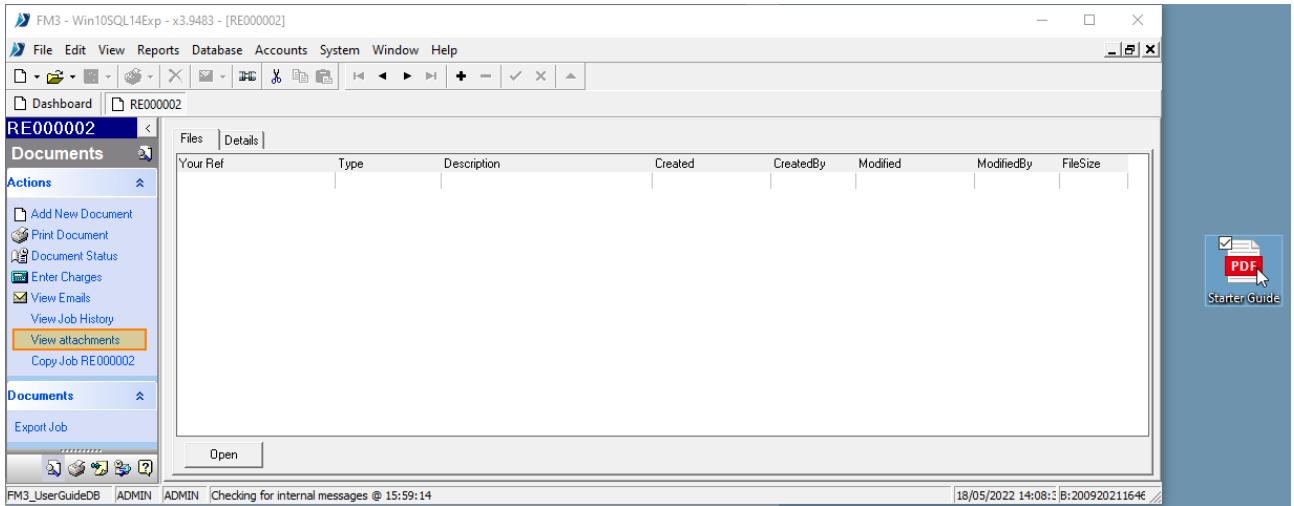
Details	Tab which holds basic fields regarding the template.
Name/ Description	Name and description of the template for internal storage.
Subject	Information to be extracted as the subject of the final email.
Text Template	This tab holds the body of the email template.
Template	Text to be extracted into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

## Dragging Attachments

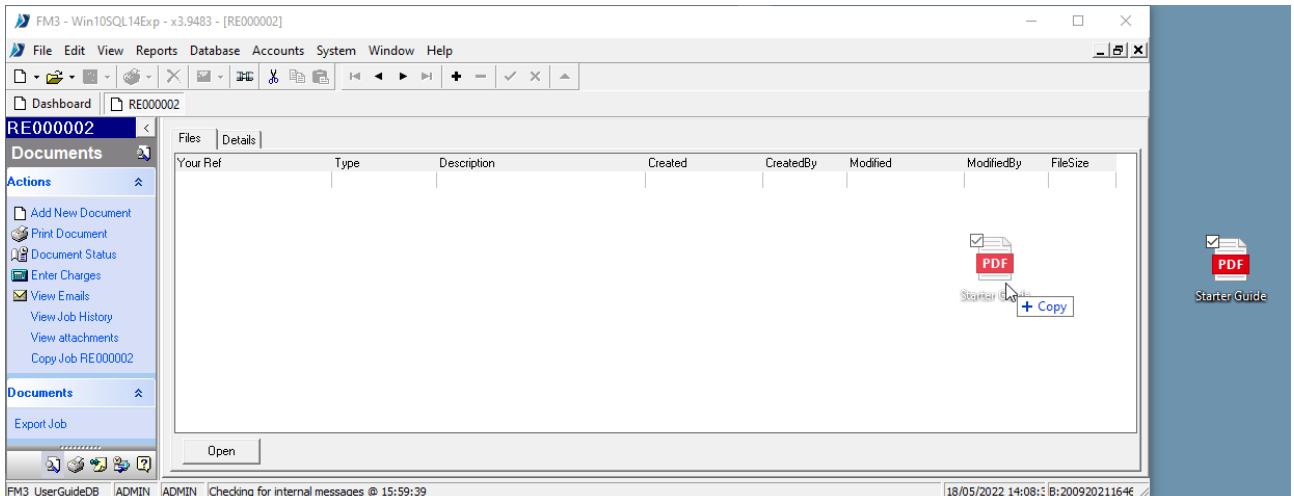
External documents and emails can be added to FM3 jobs by dragging them from your PC.

### 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.

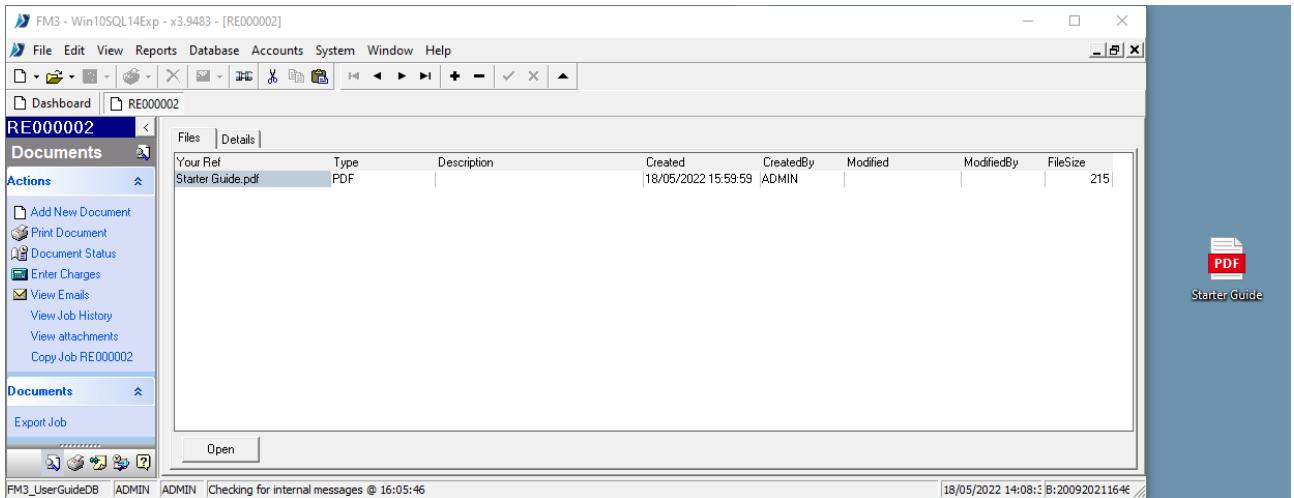


FM3 With The Attachment On Desktop.



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

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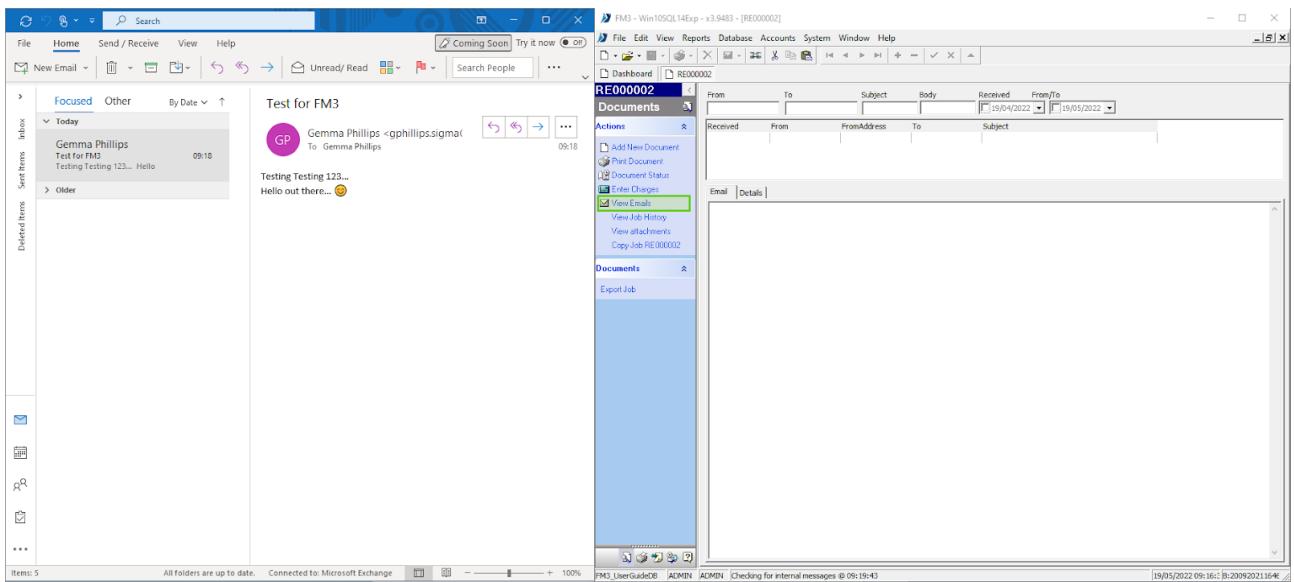
The screenshot shows the FM3 software interface. The main window displays a table of documents for job RE000002. One document, 'Starter Guide.pdf', is listed with a Type of PDF. The table includes columns for 'Your Ref', 'Type', 'Description', 'Created', 'CreatedBy', 'Modified', 'ModifiedBy', and 'FileSize'. The 'FileSize' column shows a value of 215. To the right of the table, a file icon with the text 'Starter Guide' and 'PDF' is visible. The bottom status bar shows the date and time as 18/05/2022 14:08:18 and the file path as B:\2099\2021164.

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

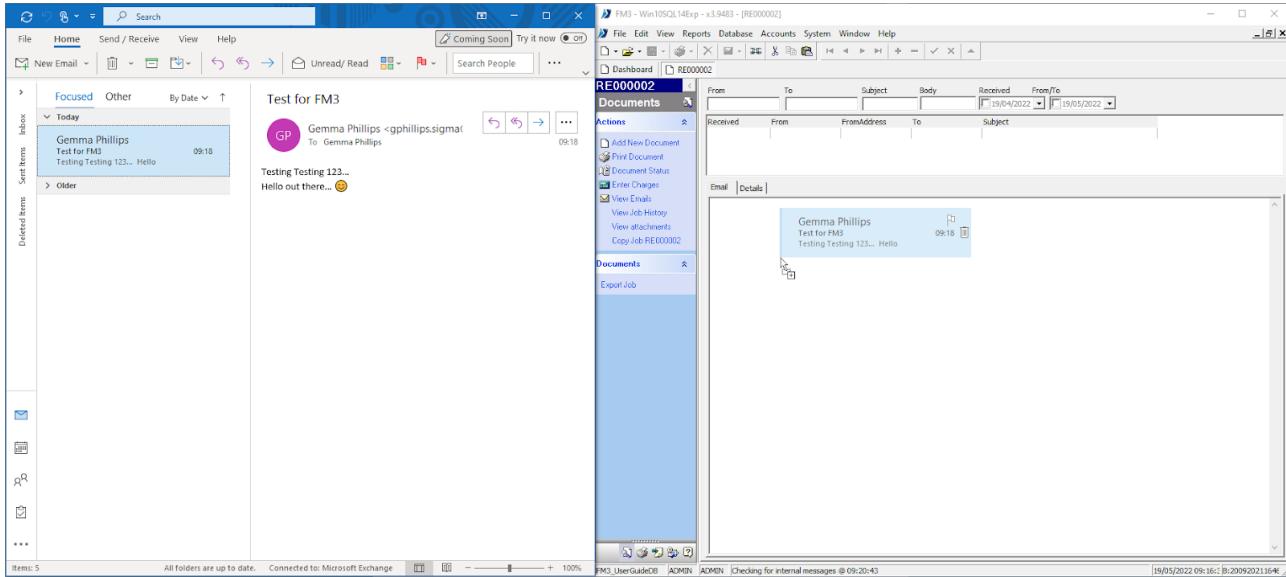
Attaching emails to jobs will use the same process with slight differences: Emails are to be dropped into the 'View Emails' page, not attachments and Outlook should be used to drag these emails.



The screenshot shows both the Microsoft Outlook application and the FM3 software running side-by-side. The Outlook window on the left shows an email from 'Gemma Phillips <gphilips@sigma...' to 'Gemma Phillips' with the subject 'Test for FM3'. The body of the email contains the text 'Testing Testing 123... Hello out there... 😊'. The FM3 window on the right shows the same document information as the previous screenshot, with the 'View Emails' option highlighted in the 'Actions' menu. The bottom status bar for both applications shows the date and time as 19/05/2022 09:16:18 and the file path as B:\2099\2021164.

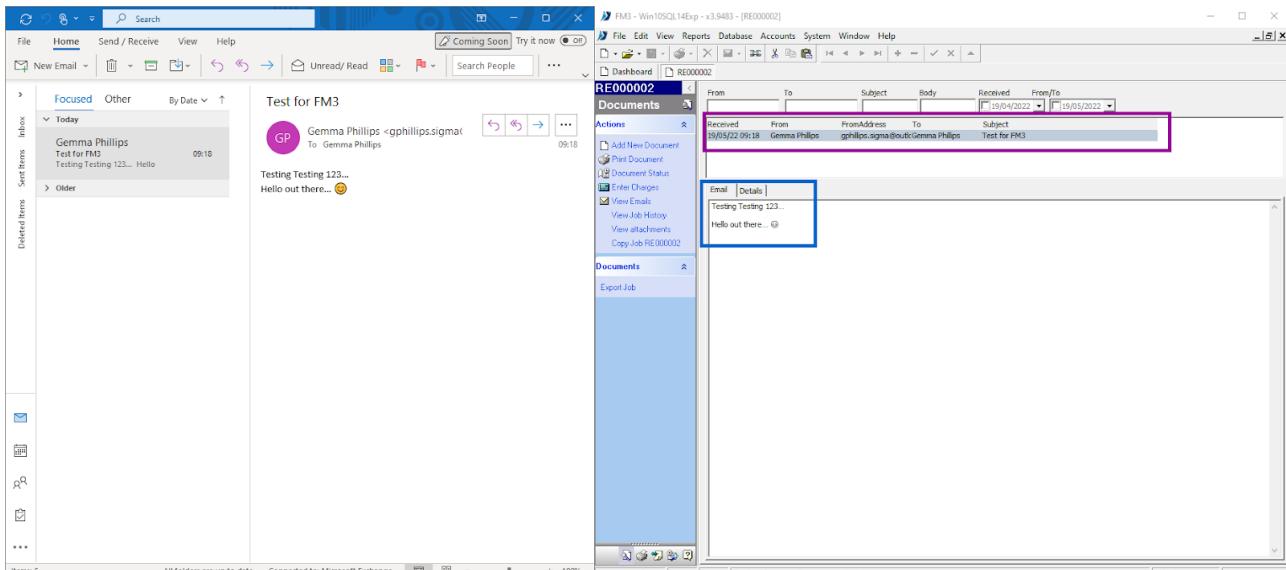
Outlook Open Next To FM3

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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).

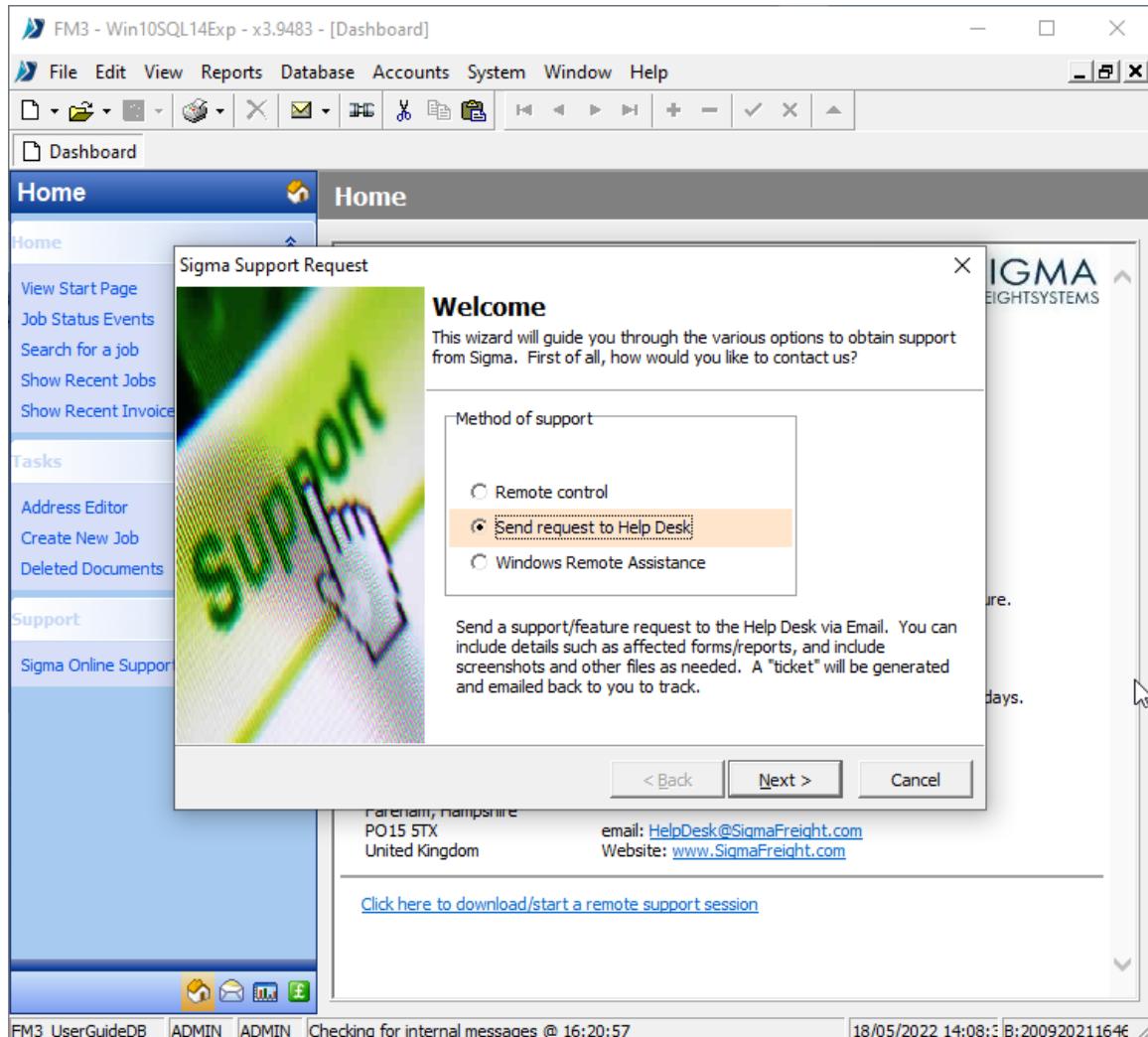


Email From Outlook Attached To The Email Page Within An FM3 Job

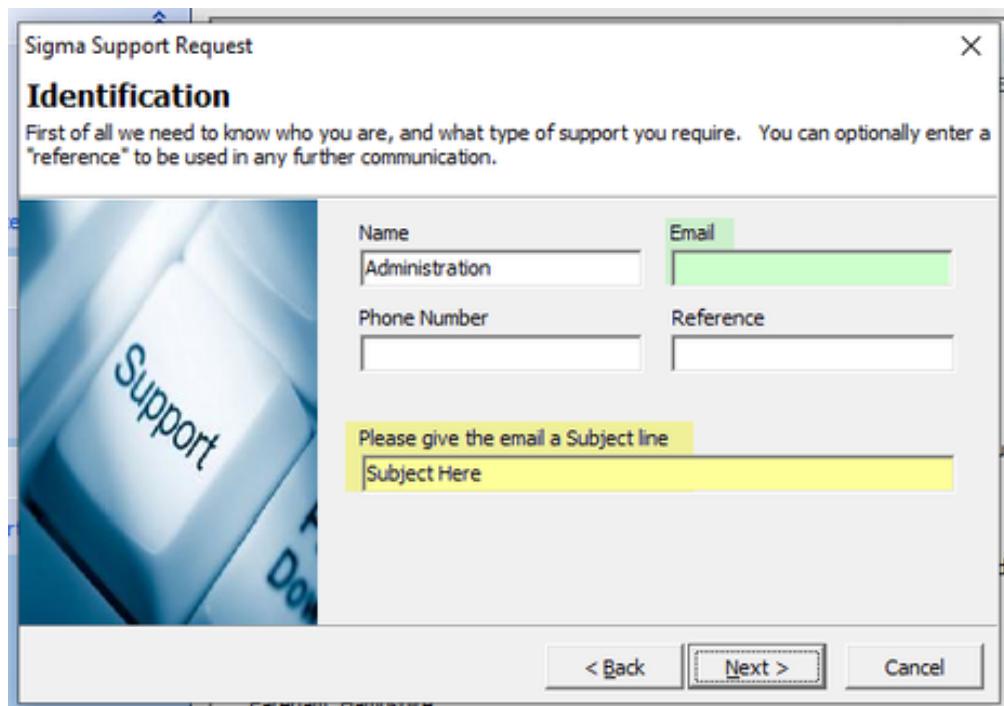
Emails will now show against the job with **information** stored in the top box and the **contents** below.

## 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.



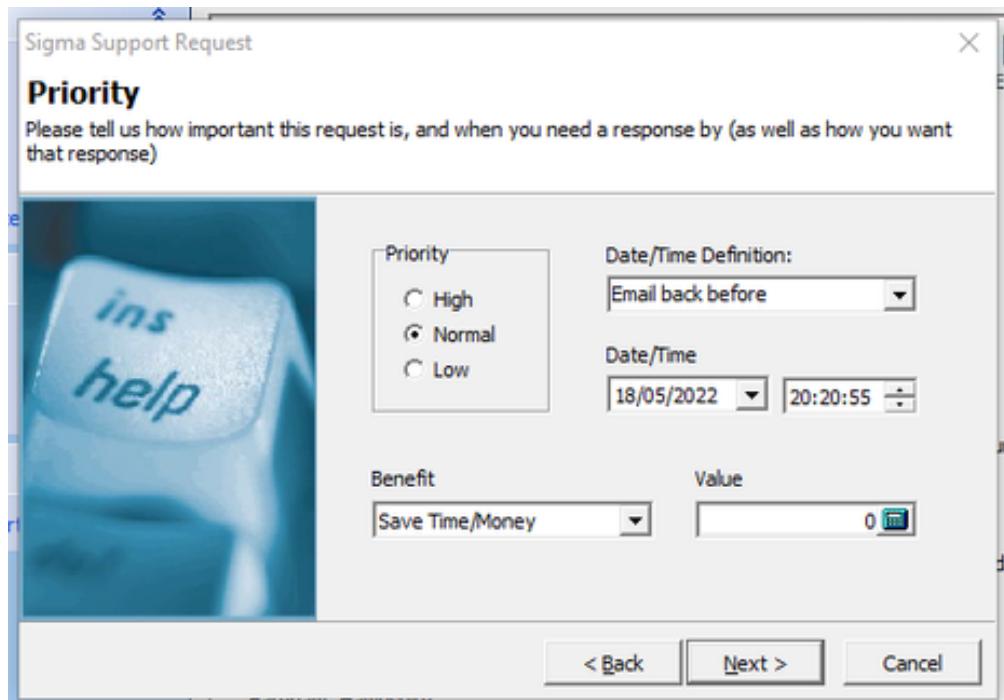
F12 > Sigma Support Request Window



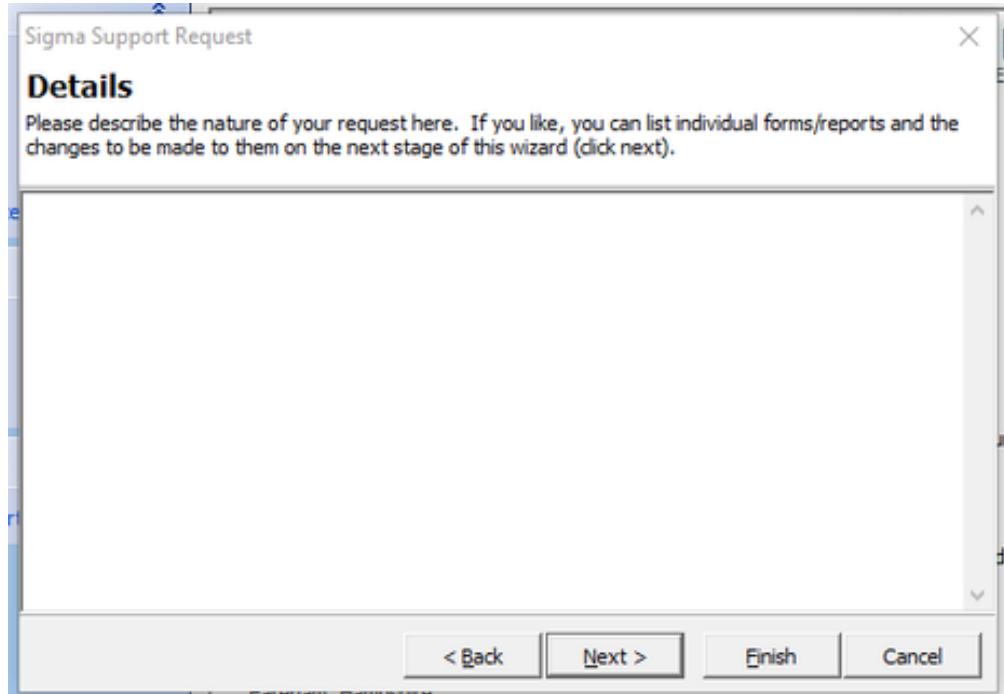
Sigma Support Request Window &gt; Identification

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.



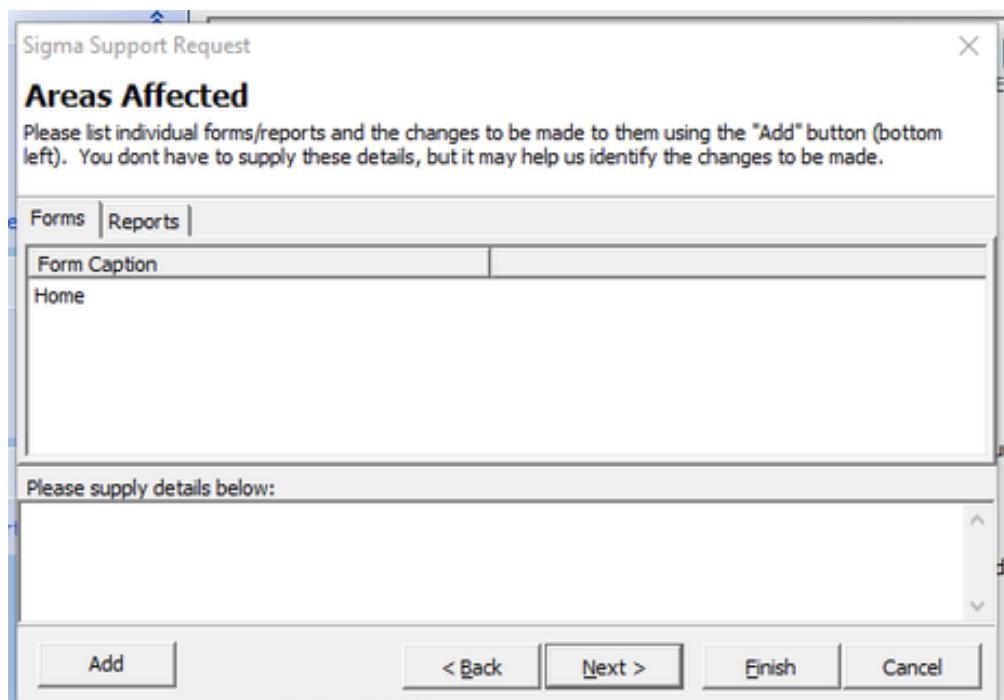
Sigma Support Request Window &gt; Priority



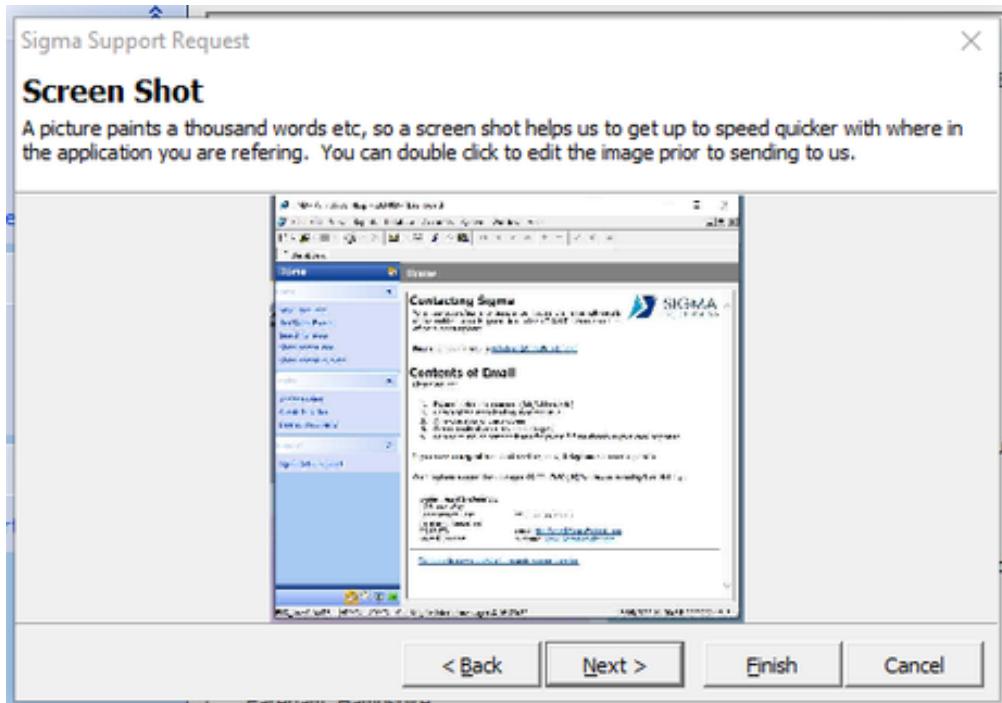
Sigma Support Request Window > Details

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.



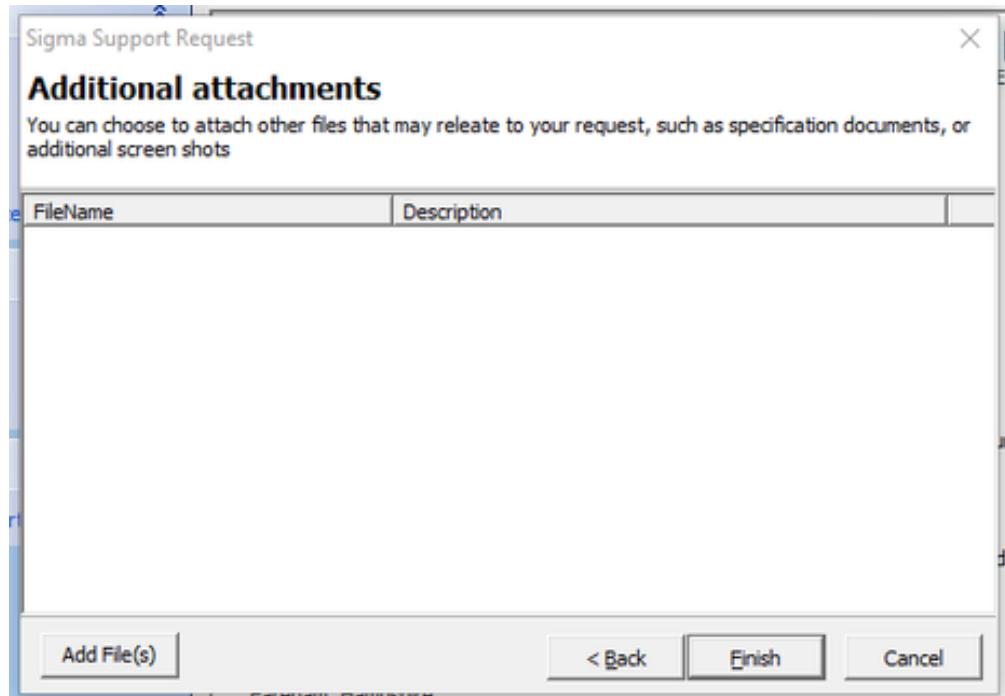
Sigma Support Request Window > Areas Affected



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](mailto:helpdesk@sigmafreight.com)

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