

## FM3 JOBS

### KEY POINTS:

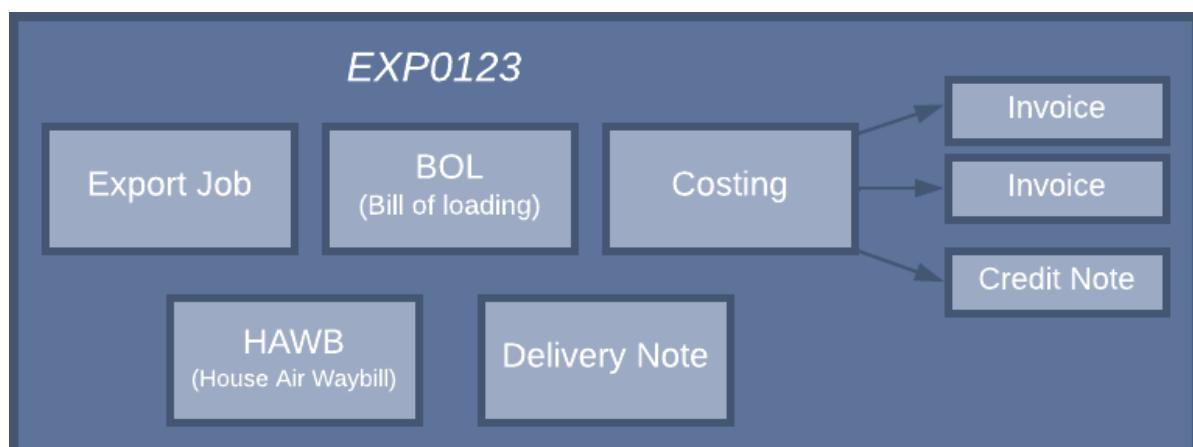
- Jobs are sorted into categories.
  - Import or Export.
  - Air, Ocean or Road.
- Department and Job type need to match!
- Use the blank page button to make a new job.
- Job = cluster of documents showing a full transaction/shipment.
- All documents seen in 'Document Status'.
- Costing holds finance information.

### TERMS:

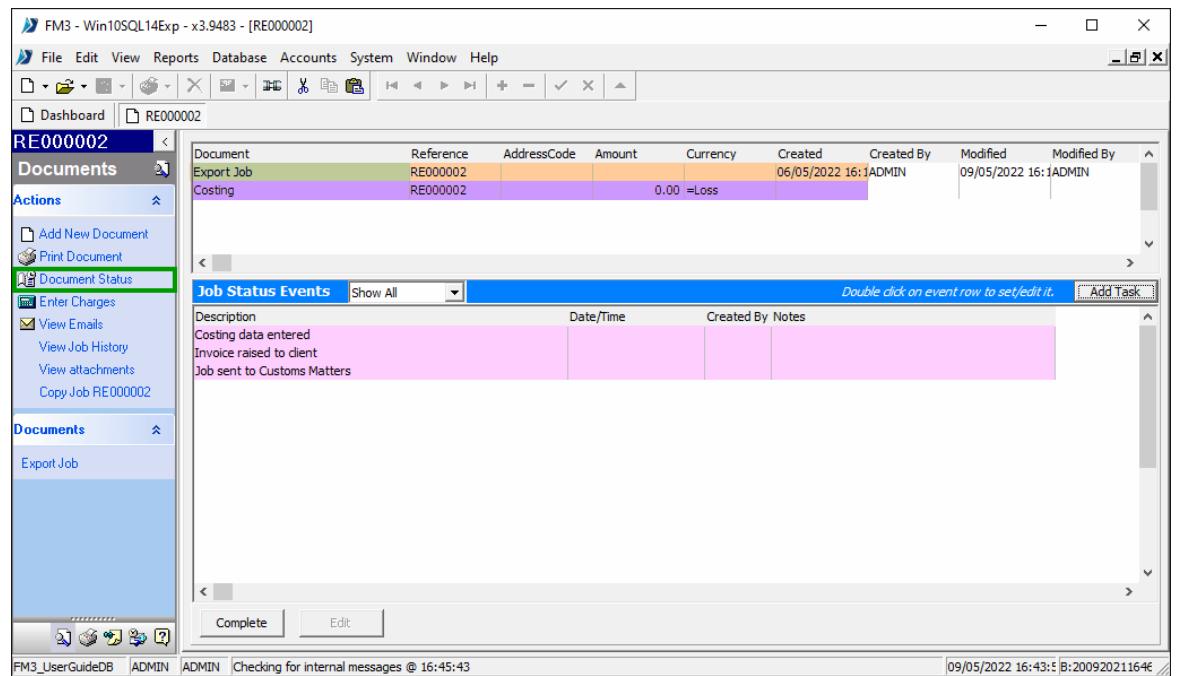
1. Consignor – The sender of the goods (Sender/Shipper)
2. Consignee – Receiver of items (The buyer)
3. Importer – Third party bringing goods from abroad for sale
4. Exporter – Exterior company sending items to another country for sale.
5. Sales (Costing) – Amounts to charge clients.
6. Accruals (Costing) – Incoming costs from suppliers related to the job.
7. Actuals (Costing) – Approved accruals once invoice is received from suppliers.

### NEW JOB

Jobs, within FM3, are collections of documents which map out the process of a complete transaction. As below, a job will have an overall reference (*EXP0123*) which will link all other documents together, such as Costing and Delivery Notes, however these documents also have individual references.

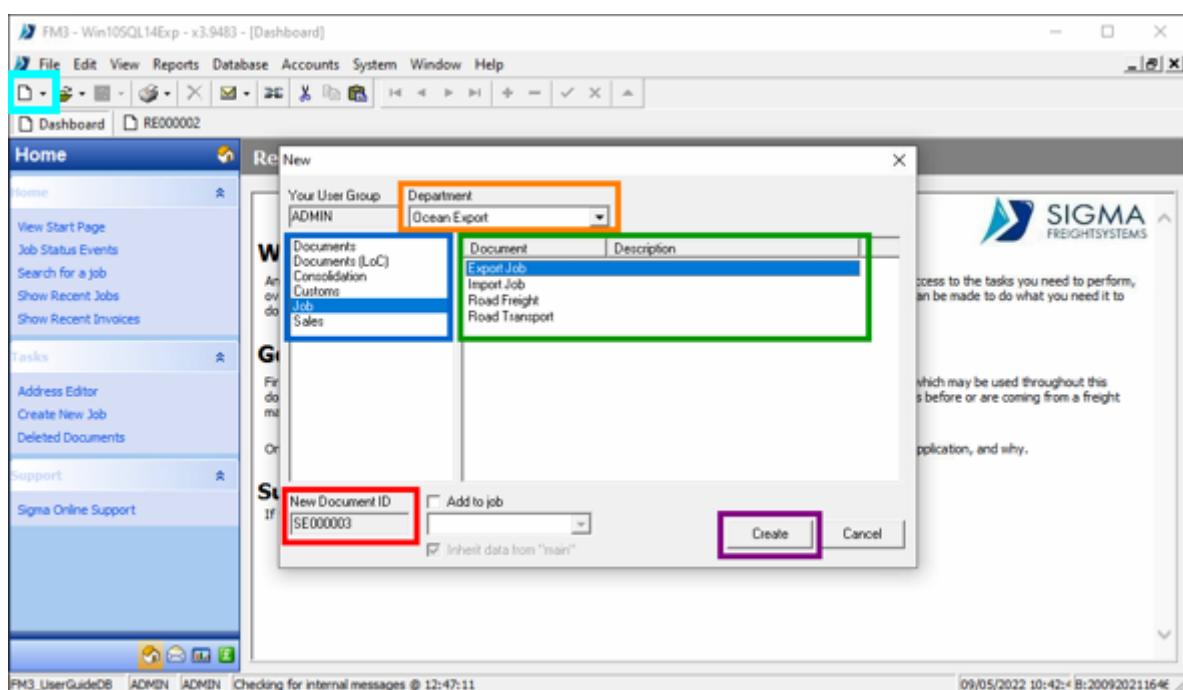


To see all documents within a job, select '**Document Status**' in the left side bar.



The screenshot shows the SIGMA FM3 software interface. The main window displays a document list for reference RE000002. The list includes 'Export Job' and 'Costing' entries. Below the list is a 'Job Status Events' section showing entries like 'Costing data entered' and 'Invoice raised to client'. The left sidebar contains a 'Documents' section with options like 'Add New Document', 'Print Document', and 'Enter Charges'. The bottom status bar shows the date and time as 09/05/2022 16:43:5 and the session ID as B:200920211646.

To create a job, click the **blank page** in the top left corner of FM3. From here the pop-up will provide multiple options:



The screenshot shows the SIGMA FM3 software interface with a 'New' dialog box open. The dialog box has a 'Department' dropdown set to 'Ocean Export'. The 'Document' list on the right includes 'Export Job', 'Import Job', 'Road Freight', and 'Road Transport'. The 'New Document ID' field is populated with 'SE000003'. The 'Create' button is highlighted with a purple box. The left sidebar shows a 'Home' section with options like 'View Start Page', 'Job Status Events', and 'Create New Job'. The bottom status bar shows the date and time as 09/05/2022 10:42:4 and the session ID as B:200920211646.

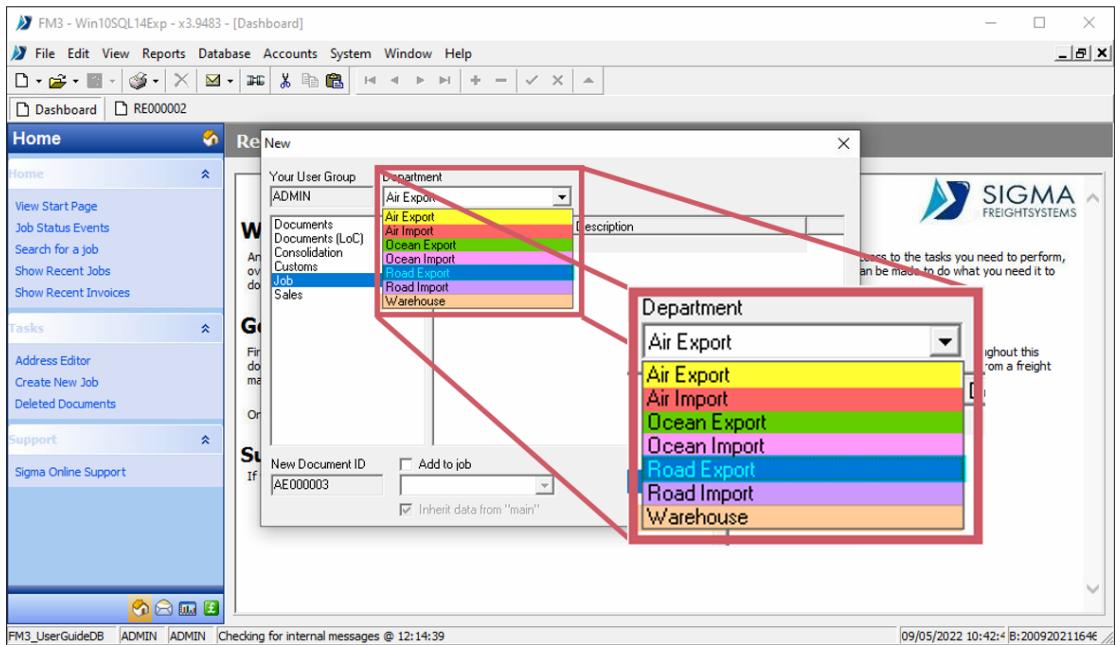
**'Department'** refers to the specific job type, made from the mode of transport (e.g., Air, Road or Ocean) and Import or Export, in this case 'Air Export' is the department.

**Document categories** are on the left, which helps navigate the document **types**.

Each job will have a reference; the theoretical ID for this new document will be shown in **this section**.

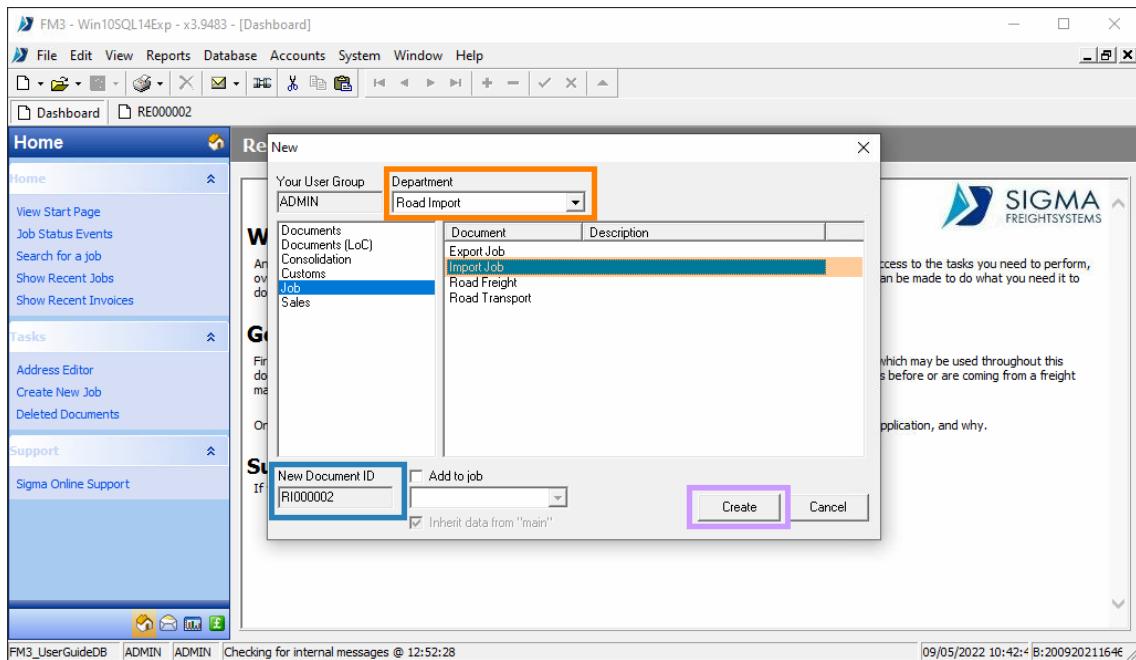
Click the **'Create'** button to make this document.





The different Departments hold meaning:

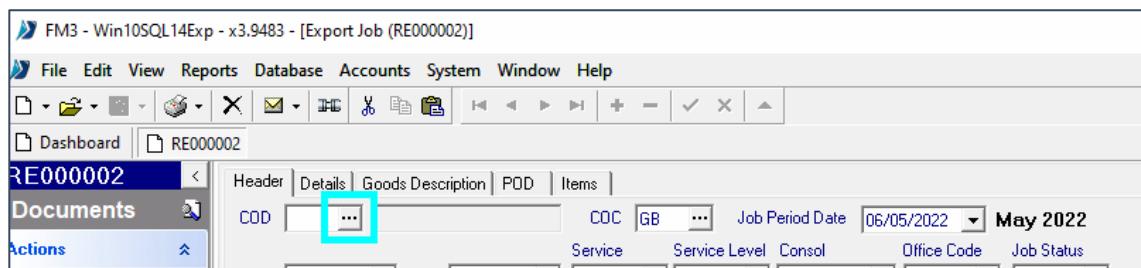
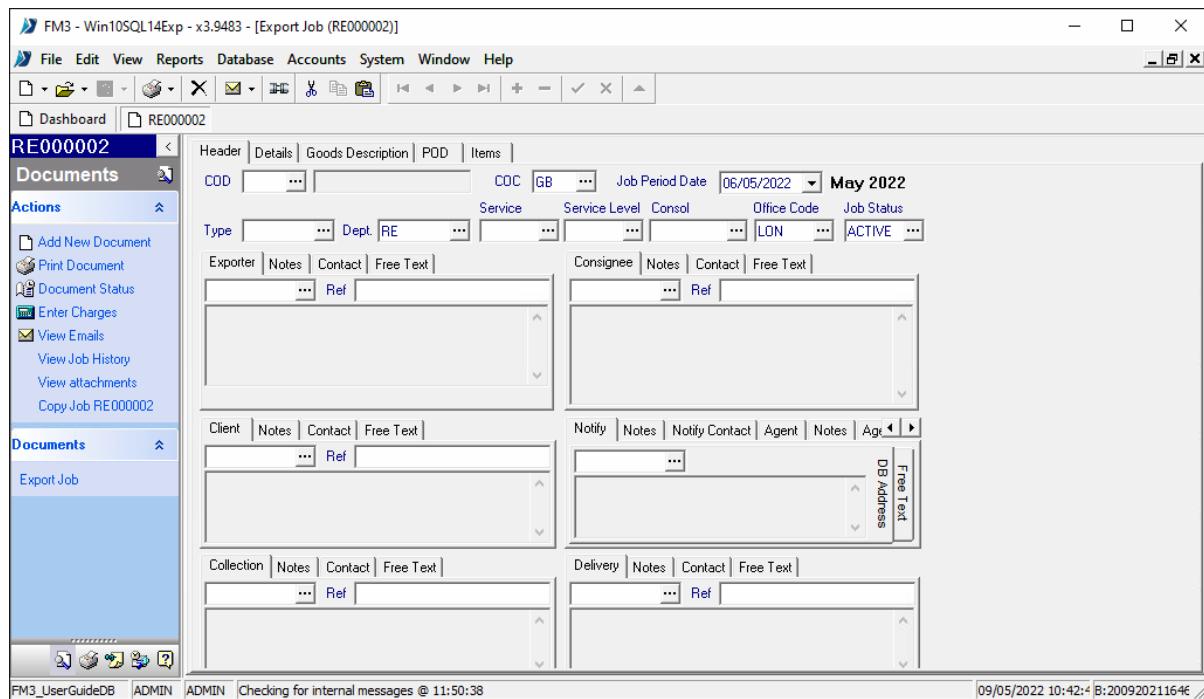
- Export jobs – Transporting goods to other countries for sale.
- Import Jobs – Receiving items from abroad for sale.
- Air, Ocean or Road – The mode of transport used to move the items.



When creating a job, the **department** and **document** type need to match, for example Road Export and Export job.

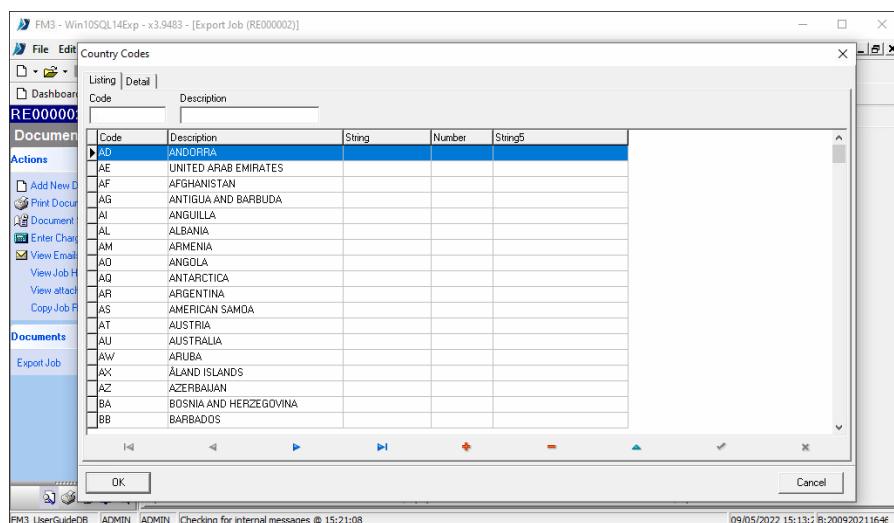
FM3 will not allow you to **create** a job without matching these, so to check, make sure there is a '**New Document ID**'.

This is a blank open job.

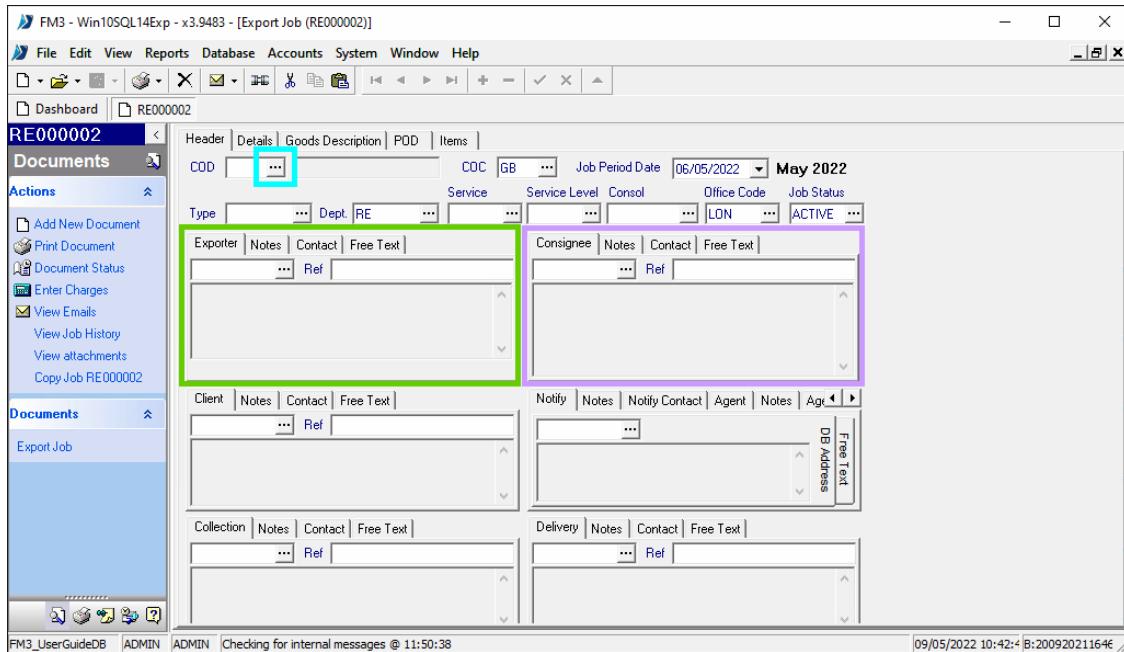


Next to most code bars is a list picker button ('...') which opens a pop-up to search for an entry related to this field. Alternatively, type the code into the bar and hit enter.

For example, the COD picker will open the country codes to search for and select.



Depending on the Job type, fields might change, such as **Exporter** changing to **Consignor** for Import jobs and **Consignee** to **Importer**.



FM3 - Win10SQL14Exp - x3.9483 - [Export Job (RE000002)]

File Edit View Reports Database Accounts System Window Help

RE000002

Header Details Goods Description POD Items

COD [COD] [GB] ... Job Period Date 06/05/2022 May 2022

Type [Type] [Dept] [RE] ... Service Service Level Consol Office Code Job Status

Exporter Notes Contact Free Text [Ref]

Consignee Notes Contact Free Text [Ref]

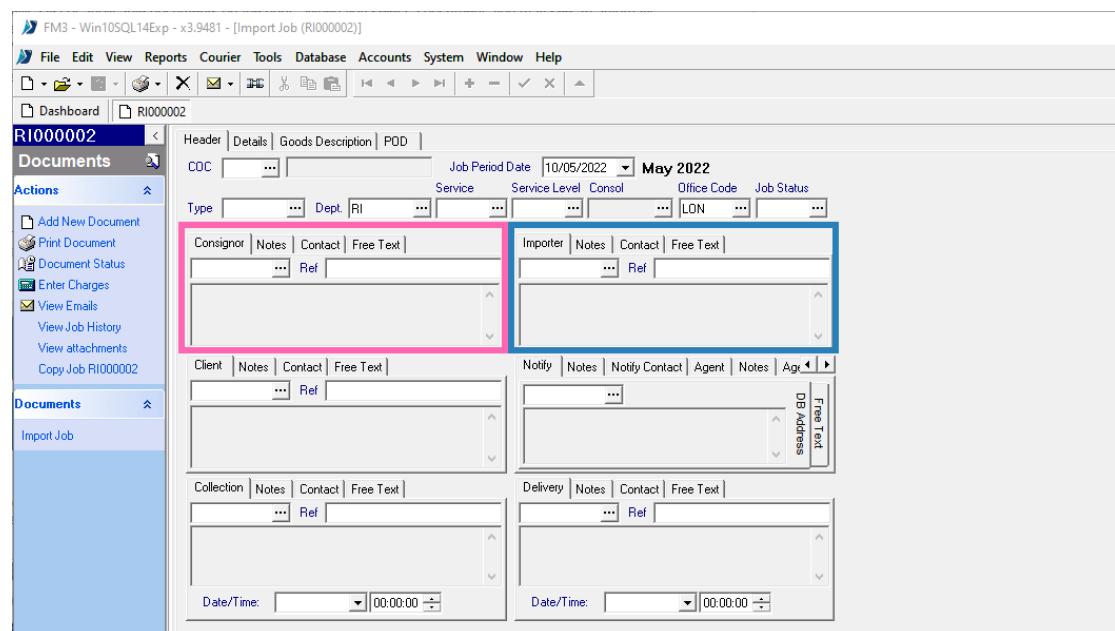
Client Notes Contact Free Text [Ref]

Notify Notes Notify Contact Agent Notes [Ref] [Free Text]

Collection Notes Contact Free Text [Ref]

Delivery Notes Contact Free Text [Ref]

FM3\_UserGuideDB ADMIN ADMIN Checking for internal messages @ 11:50:38 09/05/2022 10:42:4 B:200920211646



FM3 - Win10SQL14Exp - x3.9481 - [Import Job (RI000002)]

File Edit View Reports Courier Tools Database Accounts System Window Help

RI000002

Header Details Goods Description POD

COD [COD] [GB] ... Job Period Date 10/05/2022 May 2022

Type [Type] [Dept] [RI] ... Service Service Level Consol Office Code Job Status

Consignor Notes Contact Free Text [Ref]

Importer Notes Contact Free Text [Ref]

Client Notes Contact Free Text [Ref]

Notify Notes Notify Contact Agent Notes [Ref] [Free Text]

Collection Notes Contact Free Text [Ref]

Delivery Notes Contact Free Text [Ref]

Date/Time: [Ref] 00:00:00

Date/Time: [Ref] 00:00:00

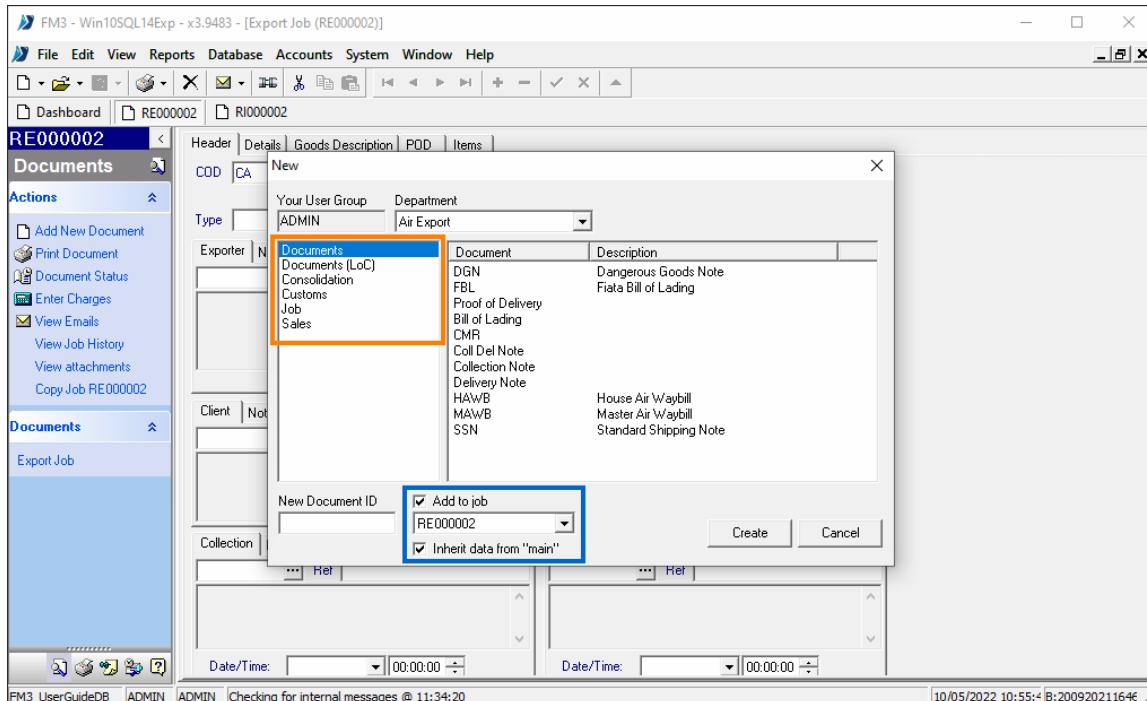
These fields also have pick lists, which will give access to the Address Editor entries.

## ADDING DOCUMENTS

To add supporting documents, there are two methods:

- Select the blank page again.
- Click 'Add New Document' in the left panel.

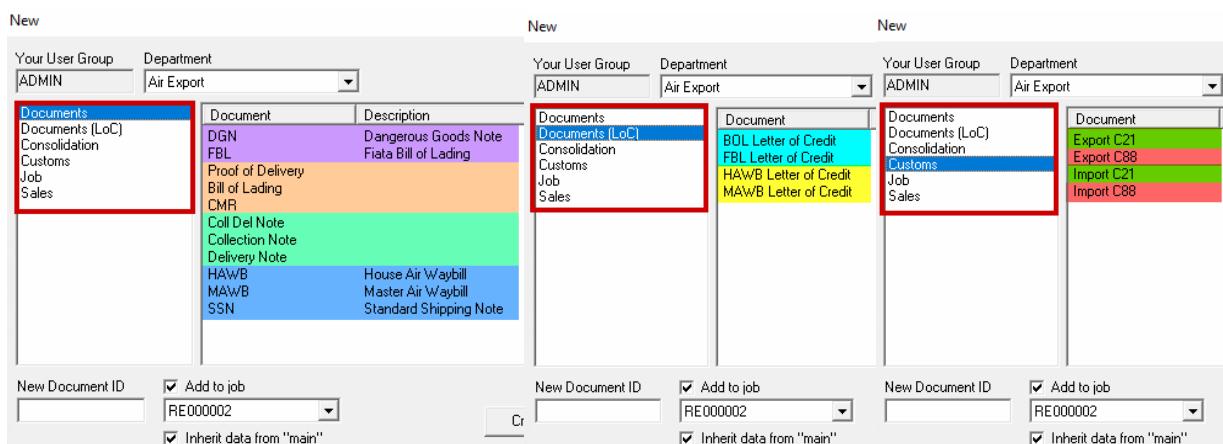
Both generate the following pop-up.



The same **document categories** are available from this screen, however, to add a document to an already existing job ensure '**Add to job**' is ticked and the job reference is correct.

## DOCUMENT CATEGORIES AND TYPES

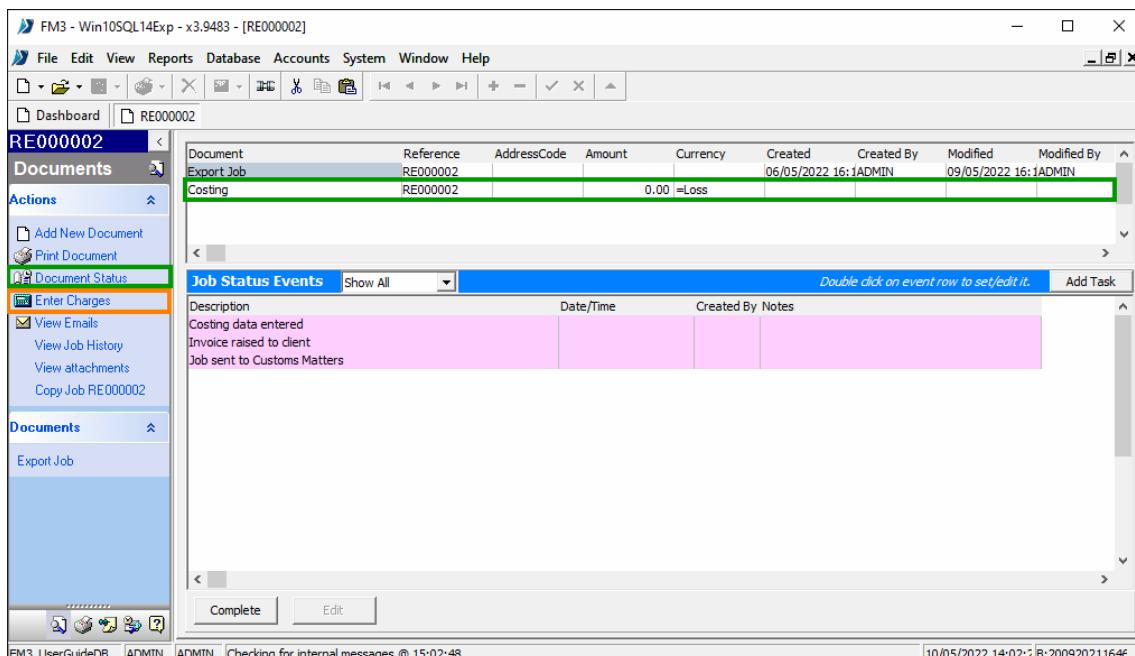
Categories are the overall group in which individual document types are, whereas types are formats for documents.



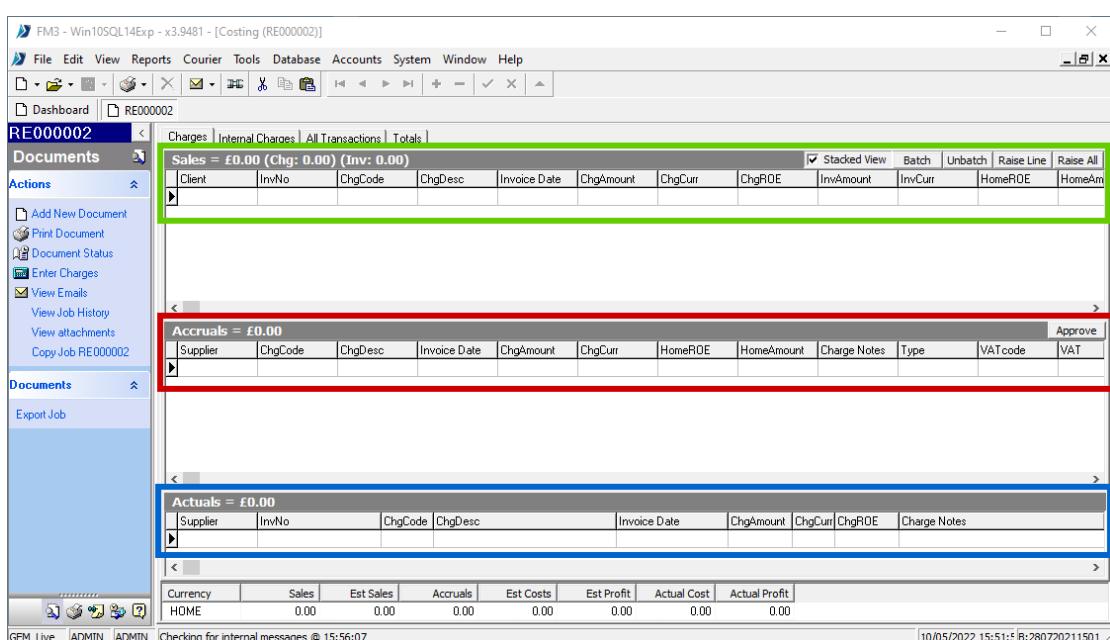
Supporting documents builds out the full picture of a job, by including Customs documents (**C21** and **C88**), **Letter of Credit** documents and **General Documents (Proof of Delivery, Collection Note and House Air Waybill)**.

## COSTING

The financials of a job are compiled within a section called '**Costing**'. This can be accessed through the '**Document Status**' or '**Enter Charges**'.



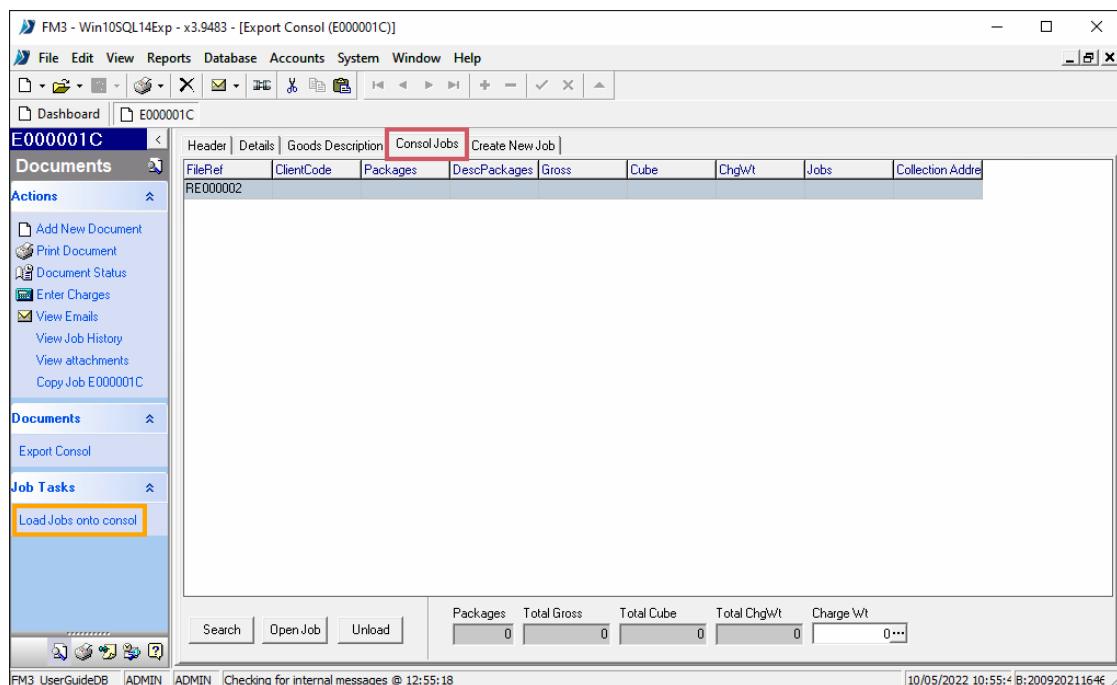
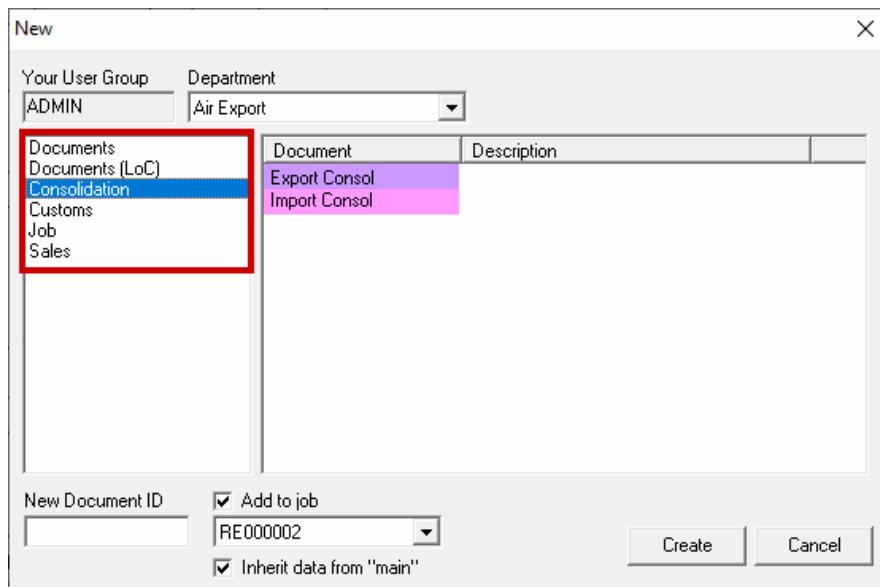
Blank costing page



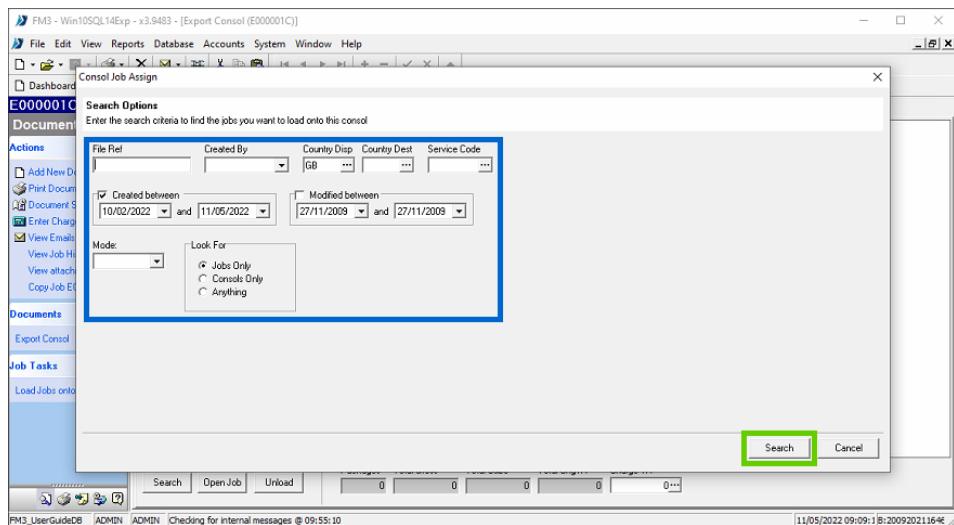

There are two types of charges to enter here: **Sales** and **Accruals**. **Sales** are the amounts clients will be charged for this job (these can be raised to Invoices and Credit Notes including Duty/VAT) and **Accruals** are costs you will incur (these can be moved/approved to **Actuals** when invoices are received from suppliers).

## CONSOLIDATION JOBS

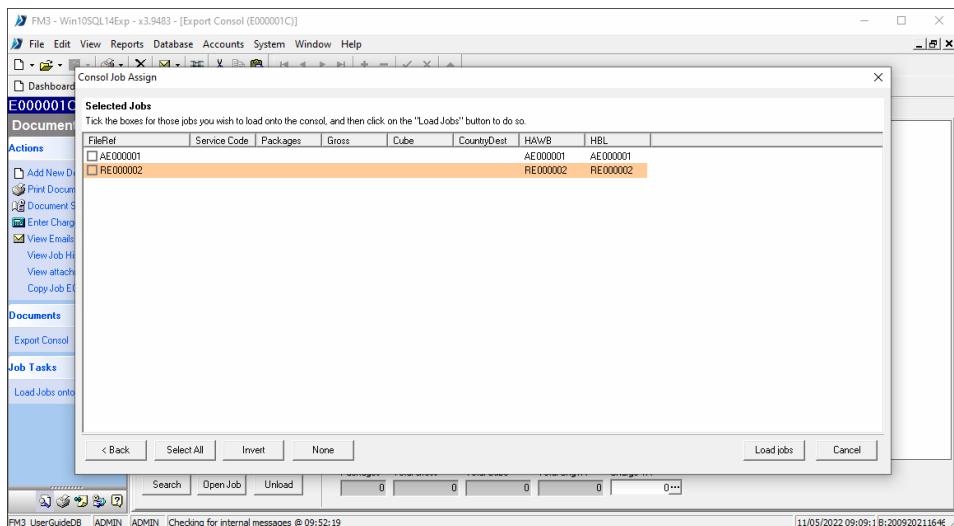
Jobs can be grouped together, through a consol job. To create these, click the 'New Document' button, select 'Consolidation' and create either an **Import** or **Export Consol**.



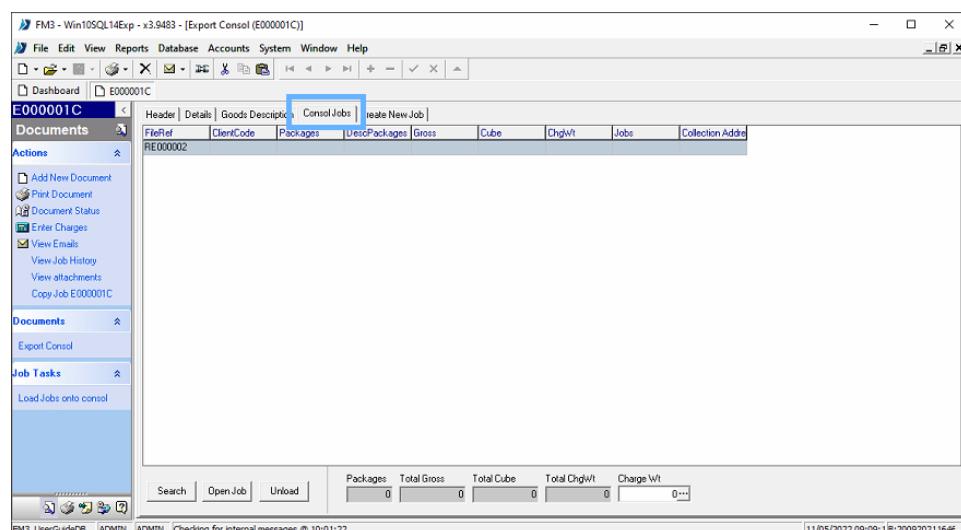
To add jobs to this Consol, click '**Load Jobs onto Consol**' and use the **search parameters** to find the specific jobs.



Hit **search** and **select the jobs** you wish to add. If the job you want is not there, check the search conditions or the jobs already loaded into the Consol.



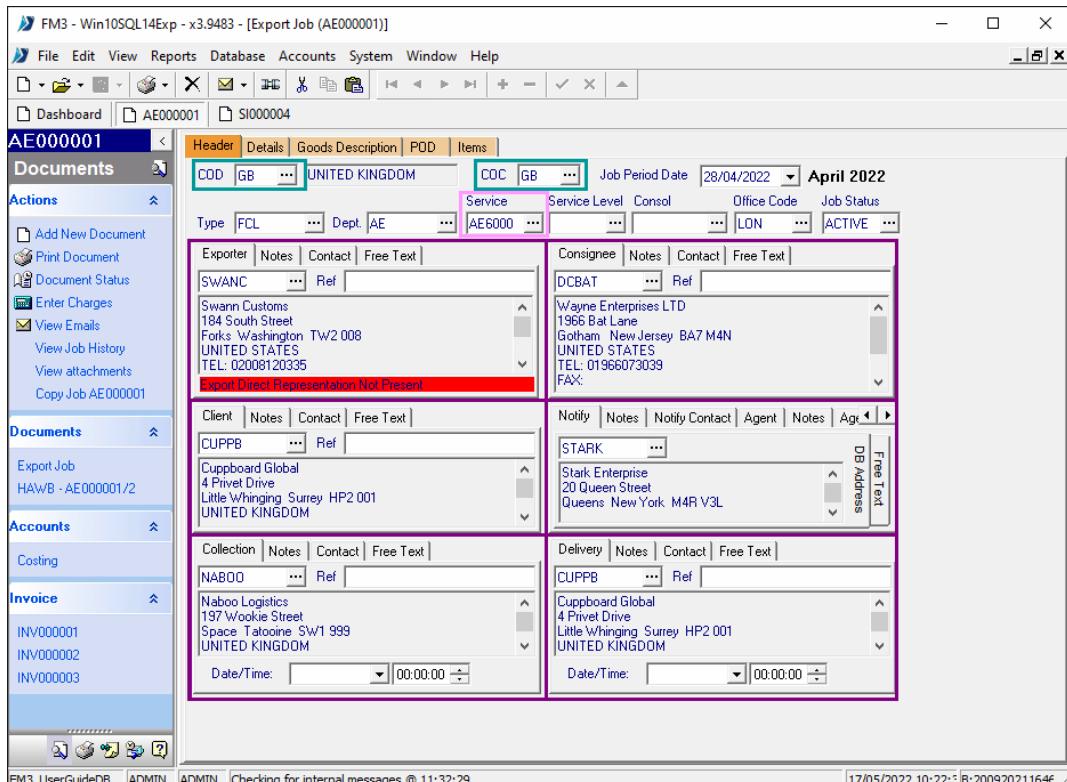
Once added all jobs will be in the '**Consol Jobs**' tab.



## JOB MENU

### HEADER PAGE

Each job will have multiple tabs for additional information, the first page, called the ‘**header**’, is where all key data is stored.



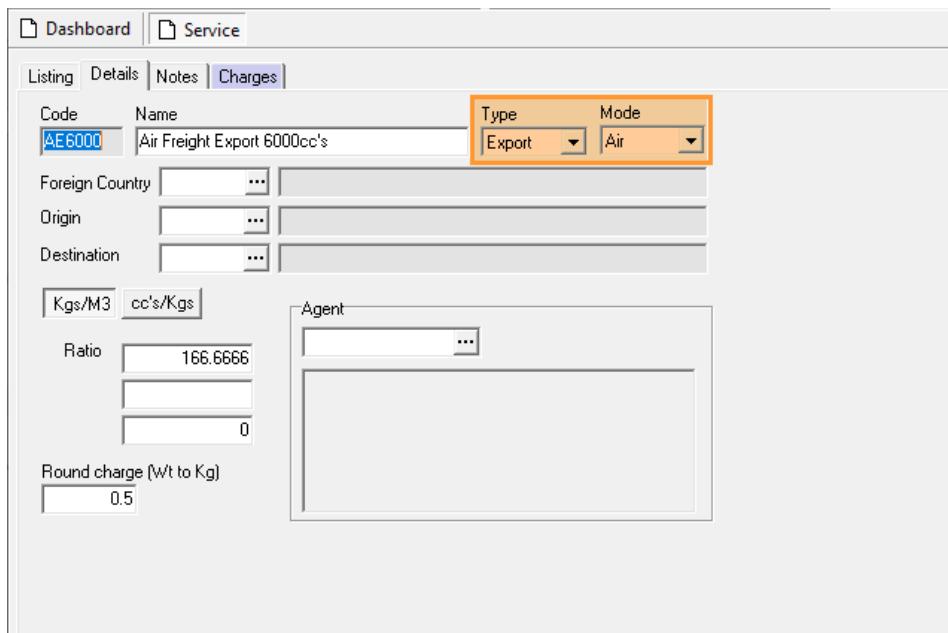
This is a blank job

**COD** and **COC** refer to the Country of Delivery and Country of Collection. Within Export jobs, **COC** will usually be ‘GB’ and **COD** would be where the goods are travelling *to*, whereas Import jobs should have **COD** as ‘GB’ and **COC** as where the goods came *from*. Road Transport will have both COC and COD as ‘GB’ as it is going between places within Great Britain.

Additional information can be added to **roles** within a job, for example, the **Client’s** information can be brought up by using the code from Address Editor. This is the same with all roles within all job types.

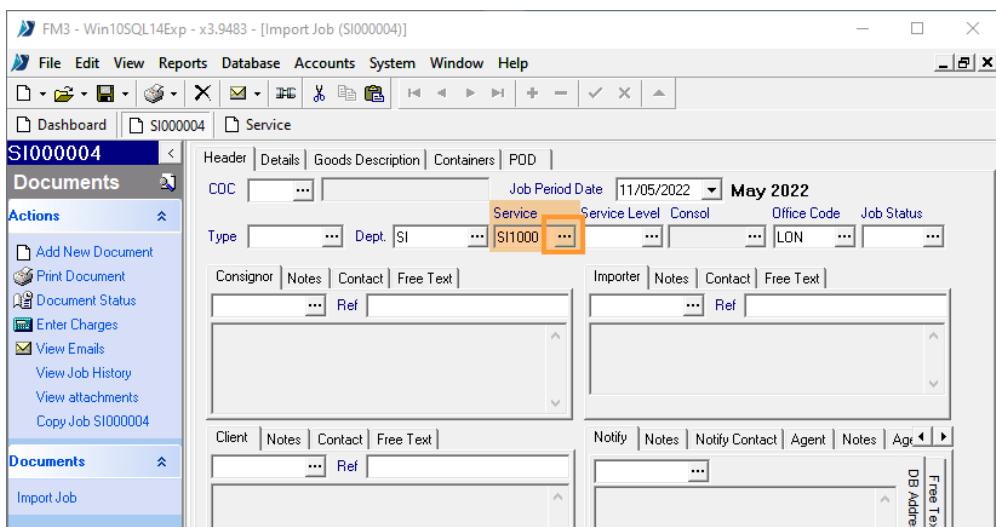
**Service Codes** represent a specific service assigned to a job, for example, AE6000, and will change certain fields within a job. These codes can have multiple fields linked, such as charge codes, which will pull through into a job. Following the example of AE6000, the Type and Mode of the job will be changed, along with any charges added to the **Charges** Tab.



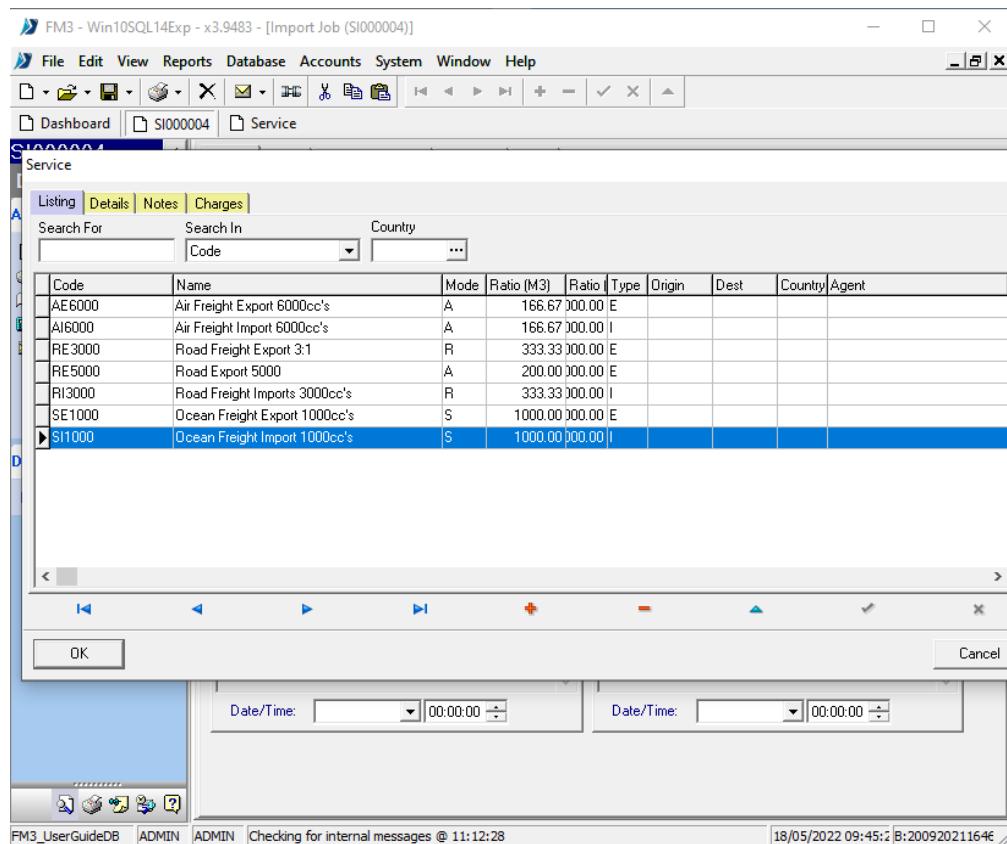


## SERVICE CODES

Service Codes represent a specific service assigned to a job, for example, *S1/1000*, and will change certain fields within a job. These codes can have multiple fields linked, such as charge codes, which will pull through into the jobs costing grid. Following the example of *S1/1000*, the Type and Mode of the job will be changed, along with any charges added to the Charges Tab.



To access Service Code configuration, select the **picklist '...'** beside the Service Code box and find the code in [Listing](#).



FM3 - Win10SQL14Exp - x3.9483 - [Import Job (SI00004)]

File Edit View Reports Database Accounts System Window Help

Dashboard SI00004 Service

Service

Listing Details Notes Charges

Search For Search In Country

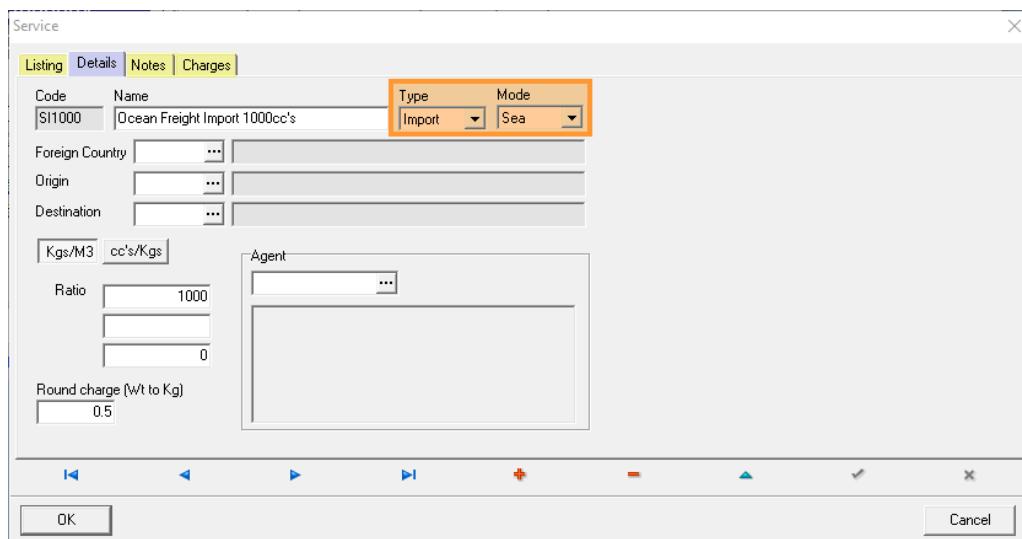
Code	Name	Mode	Ratio (M3)	Ratio	Type	Origin	Dest	Country	Agent
AE6000	Air Freight Export 6000cc's	A	166.67	000.00	E				
AI6000	Air Freight Import 6000cc's	A	166.67	000.00	I				
RE3000	Road Freight Export 3:1	R	333.33	000.00	E				
RE5000	Road Export 5000	A	200.00	000.00	E				
RI3000	Road Freight Imports 3000cc's	R	333.33	000.00	I				
SE1000	Ocean Freight Export 1000cc's	S	1000.00	000.00	E				
SI1000	Ocean Freight Import 1000cc's	S	1000.00	000.00	I				

Date/Time: 00:00:00 Date/Time: 00:00:00

OK Cancel

FM3\_UserGuideDB ADMIN ADMIN Checking for internal messages @ 11:12:28 18/05/2022 09:45:18:200920211646

Once the code is selected, press on the 'Details' tab to edit the fields linked to the code. The two main fields on this page are '**Type**' and '**Mode**' which will change the same fields in any job given this Service Code.



Service

Listing Details Notes Charges

Code	Name	Type	Mode
SI1000	Ocean Freight Import 1000cc's	Import	Sea

Foreign Country

Origin

Destination

Kgs/M3 cc's/Kgs

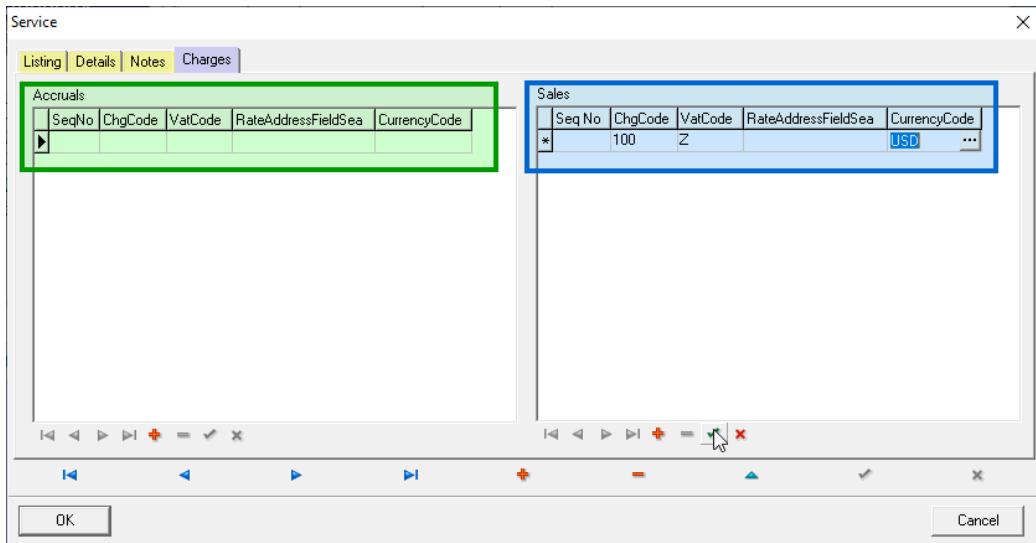
Ratio 1000

Round charge (Wt to Kg) 0.5

Agent

OK Cancel

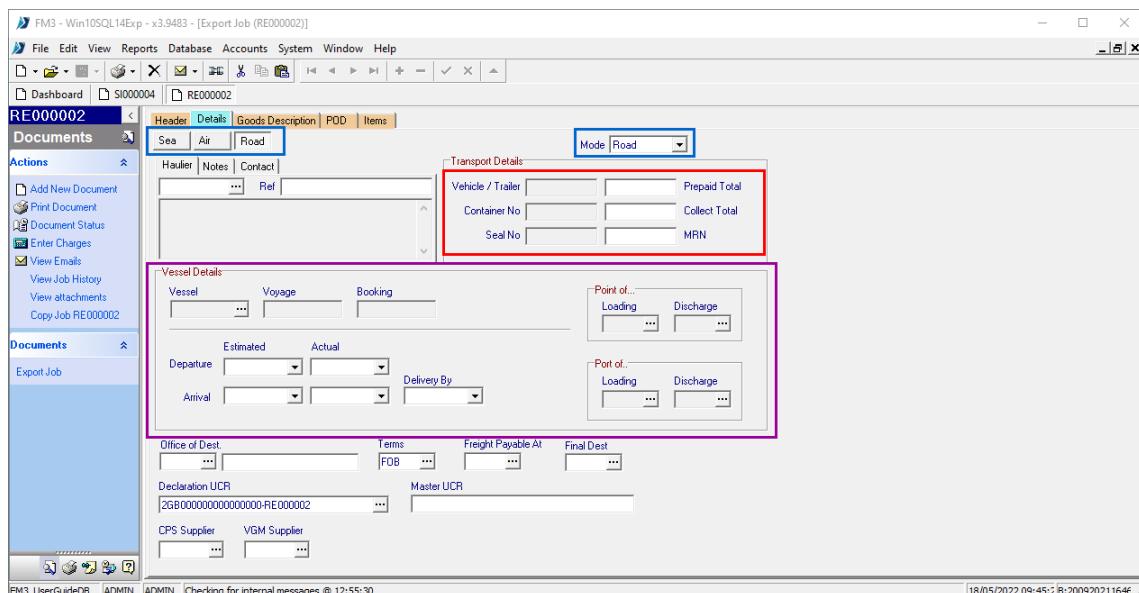
Linked charge codes can be added under the '**Charges**' tab against either **Accruals** or **Sales**. Enter the fields desired, by either typing in a code or double-clicking the box to access a picklist, and select the green tick to save.



This shows an empty **accruals** charge code grid and **sales** with one entry.

## DETAILS PAGE

The second tab, '**Details**', contains information related to the mode of transport and vessels used in this job.

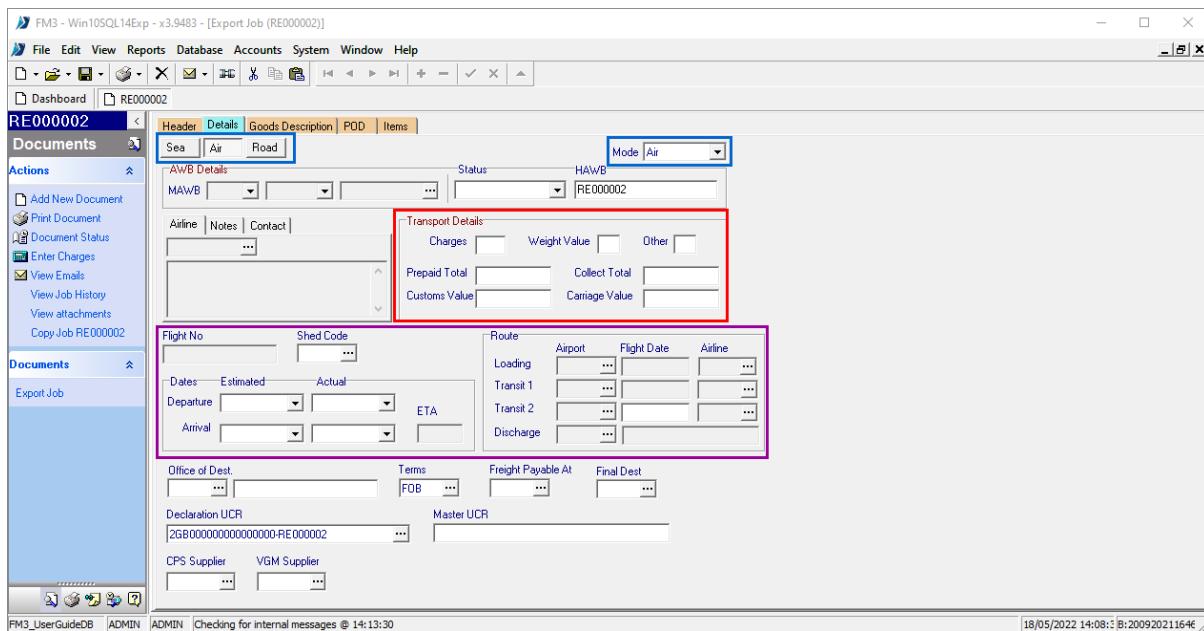


Depending on the selected mode of transport, the **Mode** and buttons towards the top should be correctly selected in order to provide the right fields. For example, Road has been selected as the page type and the **mode** has been changed to reflect this.

In road jobs, fields such as '**Vehicle**' and '**Container No**' are under **Transport Details**, however, if we change the mode and select 'Air', the Transport Detail fields are different.

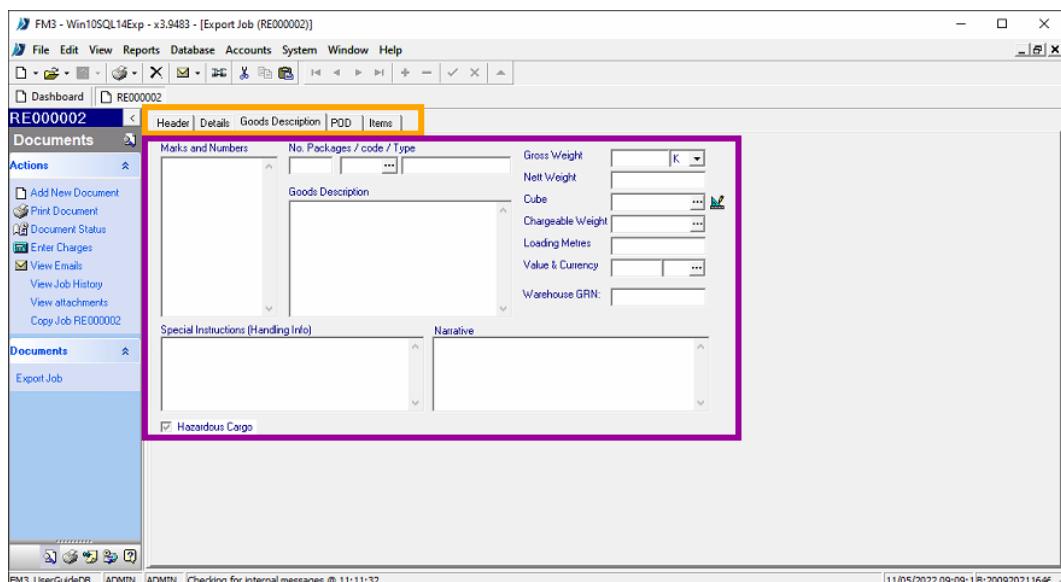
Additionally, **Vessel Details** from road jobs are changed to '**Flight No**' and Route, which outlines where the goods travel and when.





The details page should match the job type (e.g. RE = Road Export) and mode.

## GOODS DESCRIPTION PAGE



**'Goods Description'** includes individual item details, such as weight, package number and special instructions.

