

FM3 JOBS

KEY POINTS:

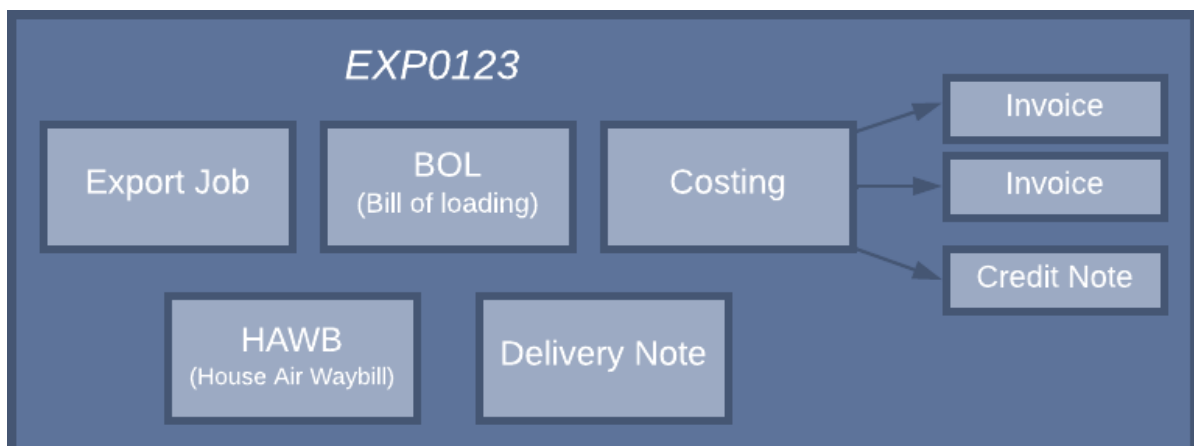
- Jobs are sorted into categories.
 - Import or Export.
 - Air, Ocean or Road.
- Department and Job type need to match!
- Use the blank page button to make a new job.
- Job = cluster of documents showing a full transaction/shipment.
- All documents seen in 'Document Status'.
- Costing holds finance information.

TERMS:

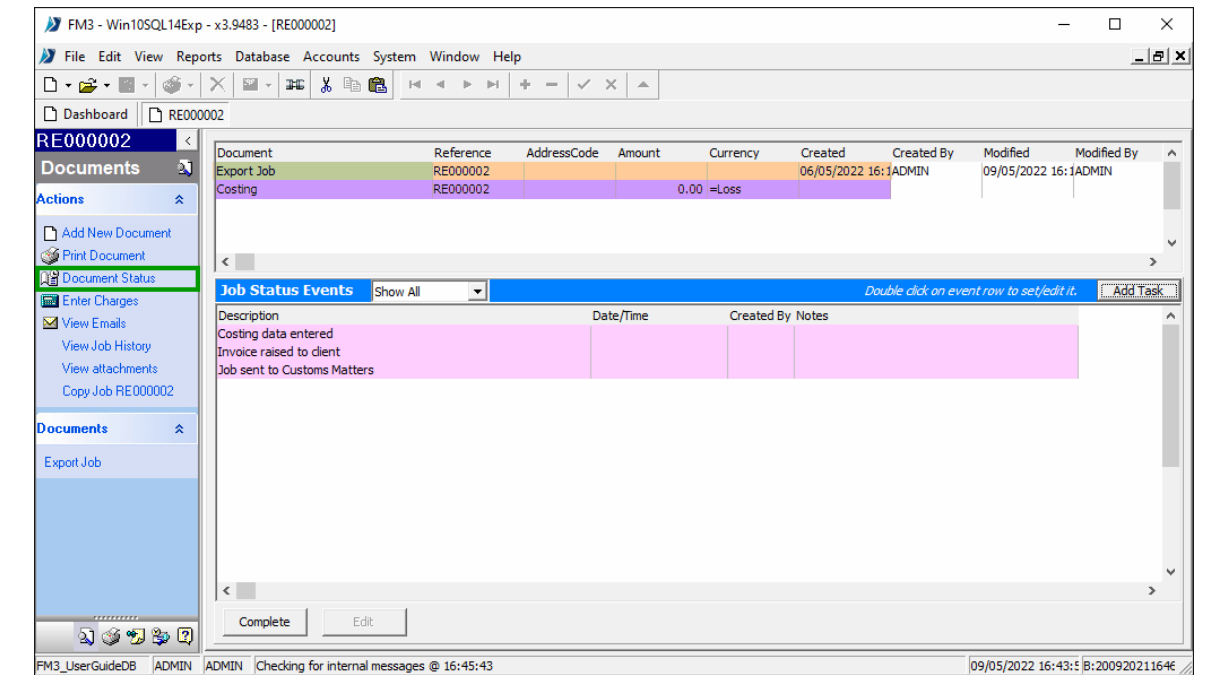
1. Consignor – The sender of the goods (Sender/Shipper)
2. Consignee – Receiver of items (The buyer)
3. Importer – Third party bringing goods from abroad for sale
4. Exporter – Exterior company sending items to another country for sale.
5. Sales (Costing) – Amounts to charge clients.
6. Accruals (Costing)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

NEW JOB

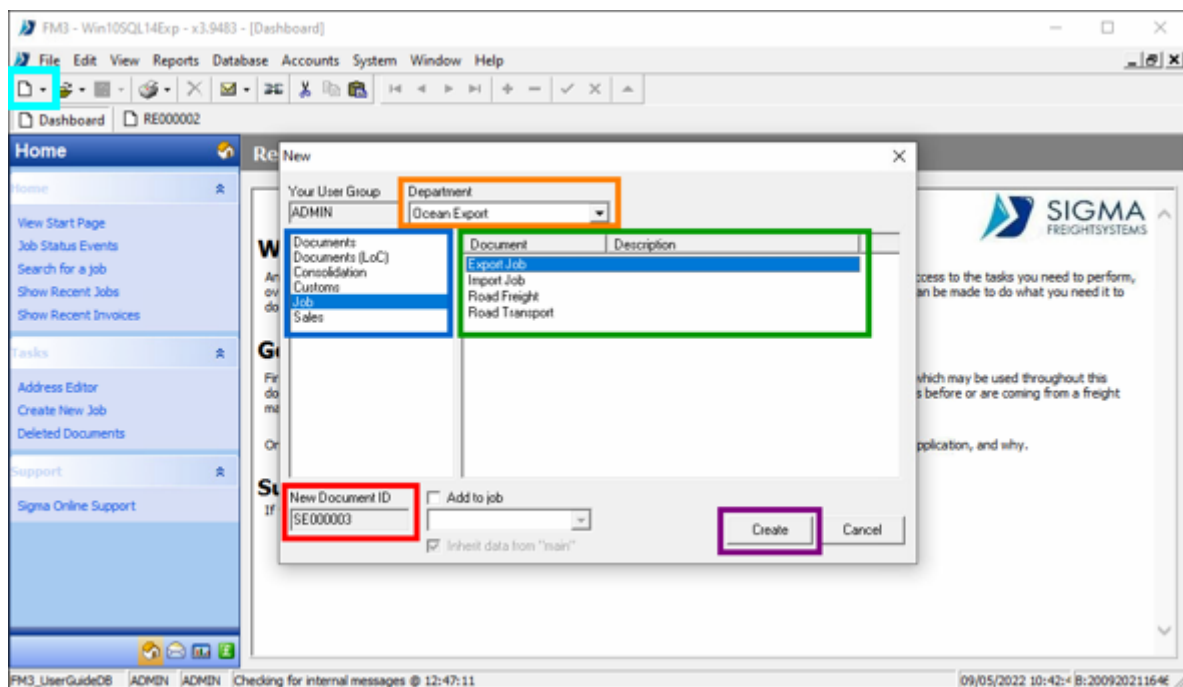
Jobs, within FM3, are collections of documents which map out the process of a complete transaction. As below, a job will have an overall reference (*EXP0123*) which will link all other documents together, such as Costing and Delivery Notes, however these documents also have individual references.



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



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



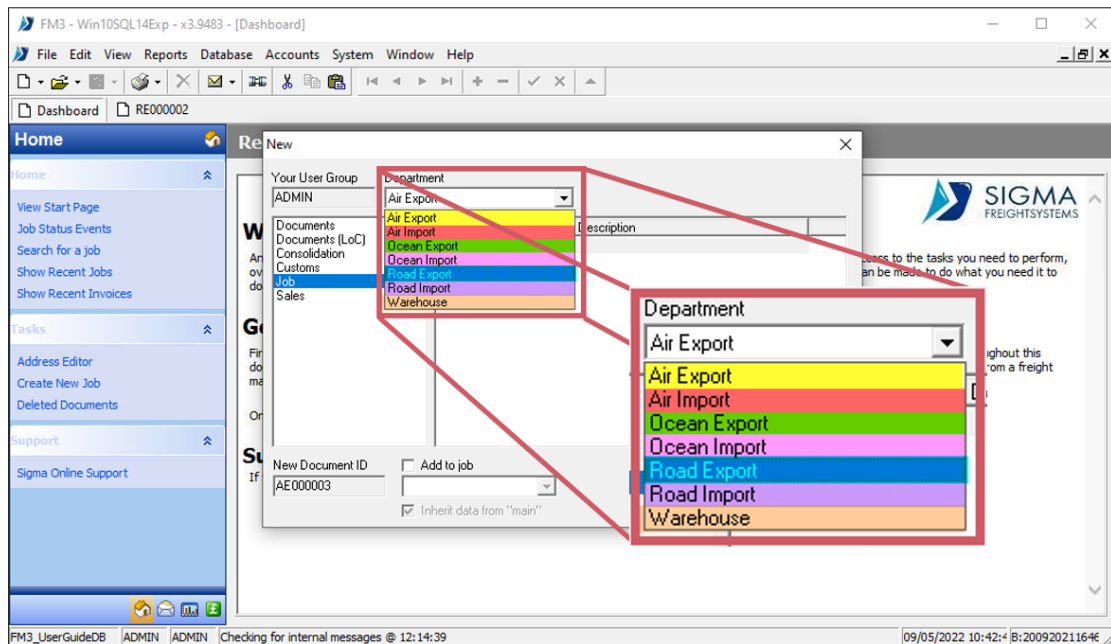
‘**Department**’ refers to the specific job type, made from the mode of transport (e.g., Air, Road or Ocean) and Import or Export, in this case ‘Air Export’ is the department.

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**.

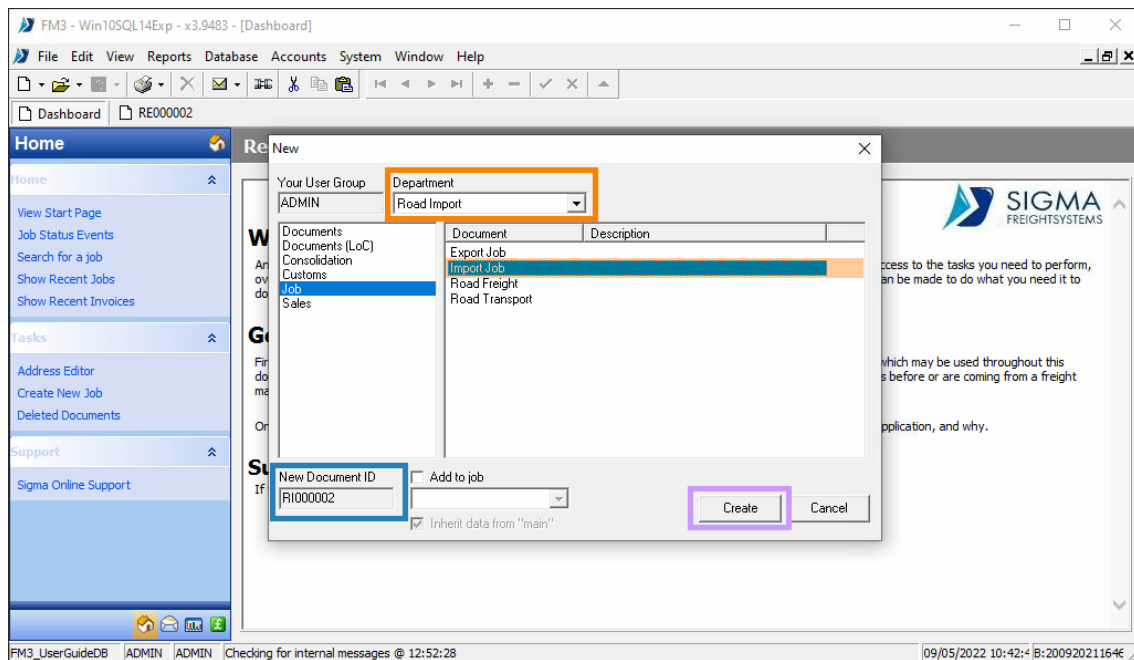
Click the ‘**Create**’ button to make this document.





The different Departments hold meaning:

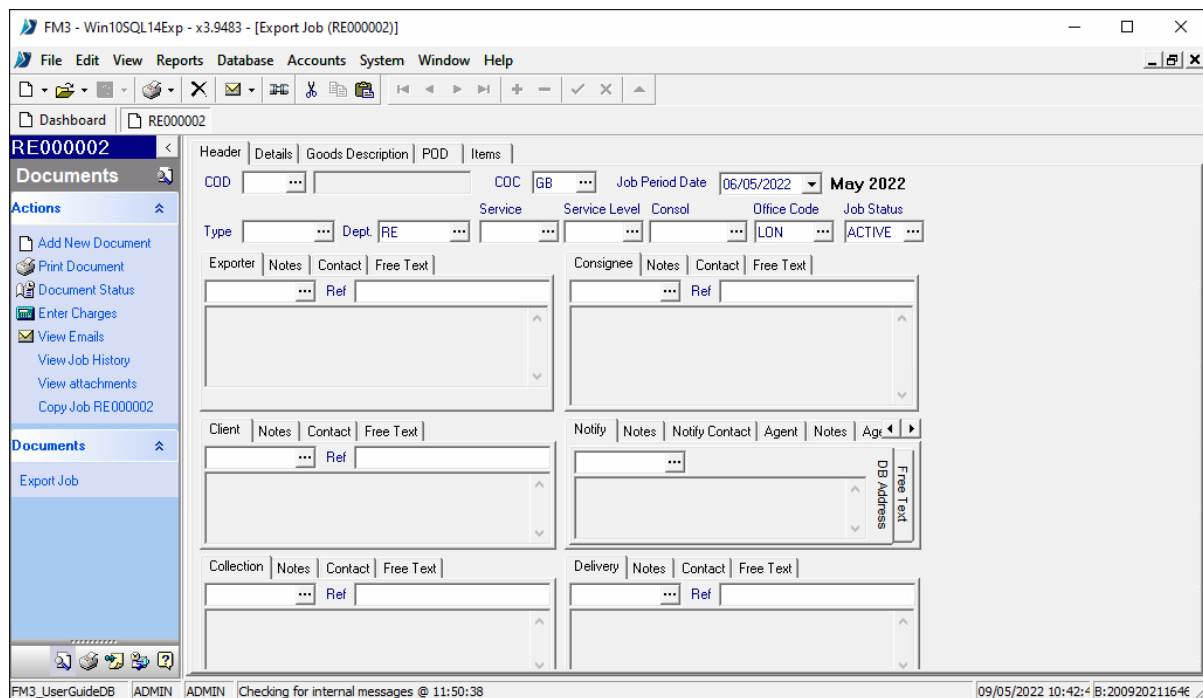
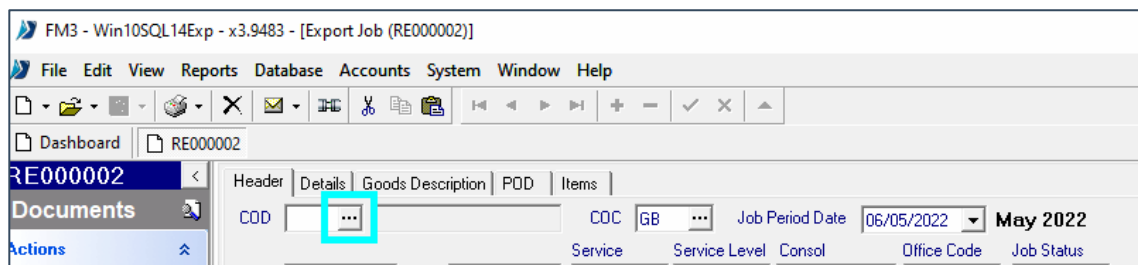
- Export jobs – Transporting goods to other countries for sale.
- Import Jobs – Receiving items from abroad for sale.
- Air, Ocean or Road – The mode of transport used to move the items.



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

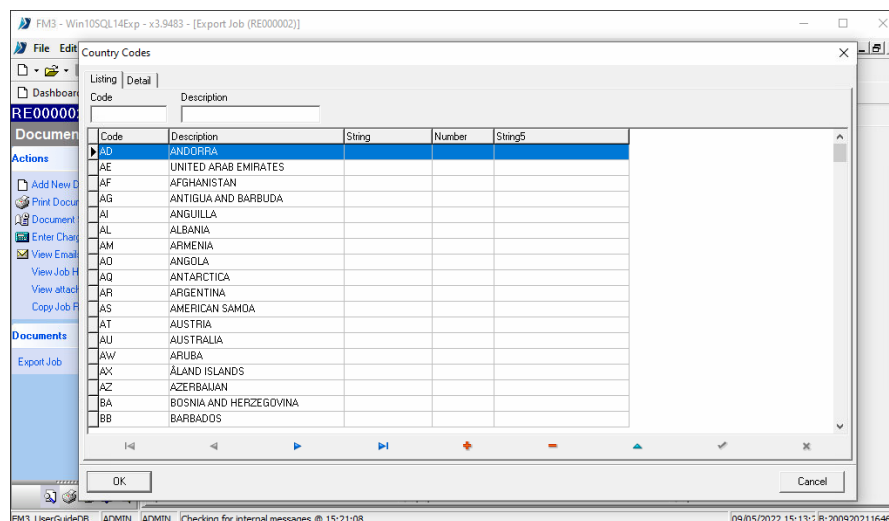
FM3 will not allow you to **create** a job without matching these, so to check, make sure there is a 'New Document ID'.

This is a blank open job.

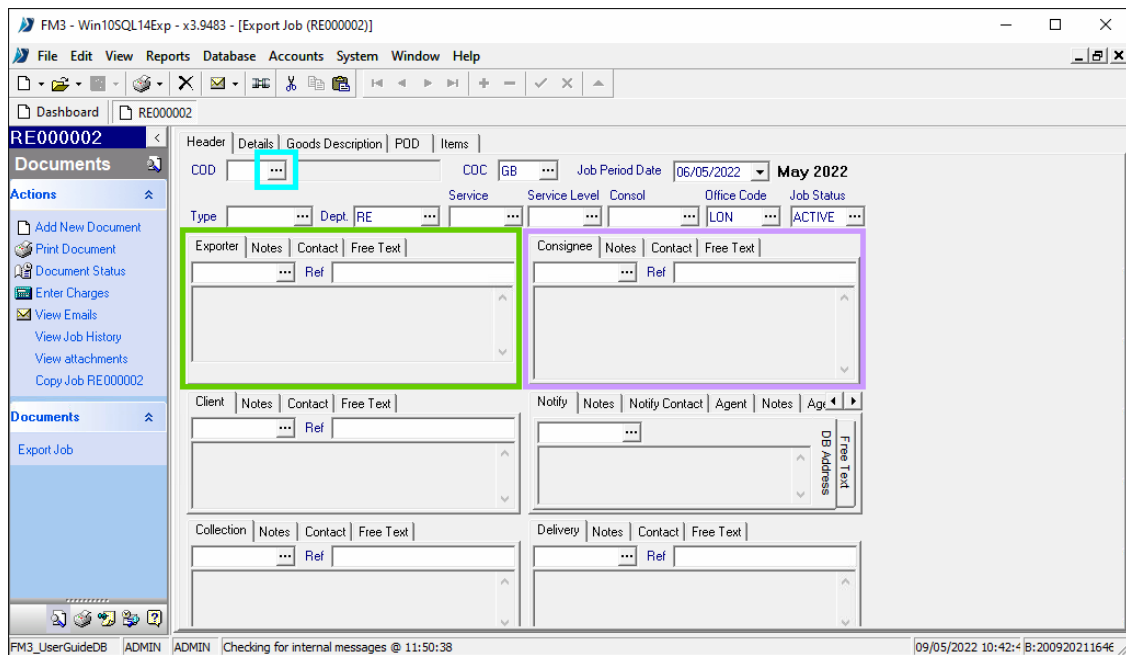



Next to most code bars is a list picker button ('...') which opens a pop-up to search for an entry related to this field. Alternatively, type the code into the bar and hit enter.

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

Dashboard RE000002

RE000002

Header Details Goods Description POD Items

COD COC GB Job Period Date 06/05/2022 May 2022

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

Exporter Notes Contact Free Text

Consignee Notes Contact Free Text

Client Notes Contact Free Text

Notify Notes Notify Contact Agent Notes Agt

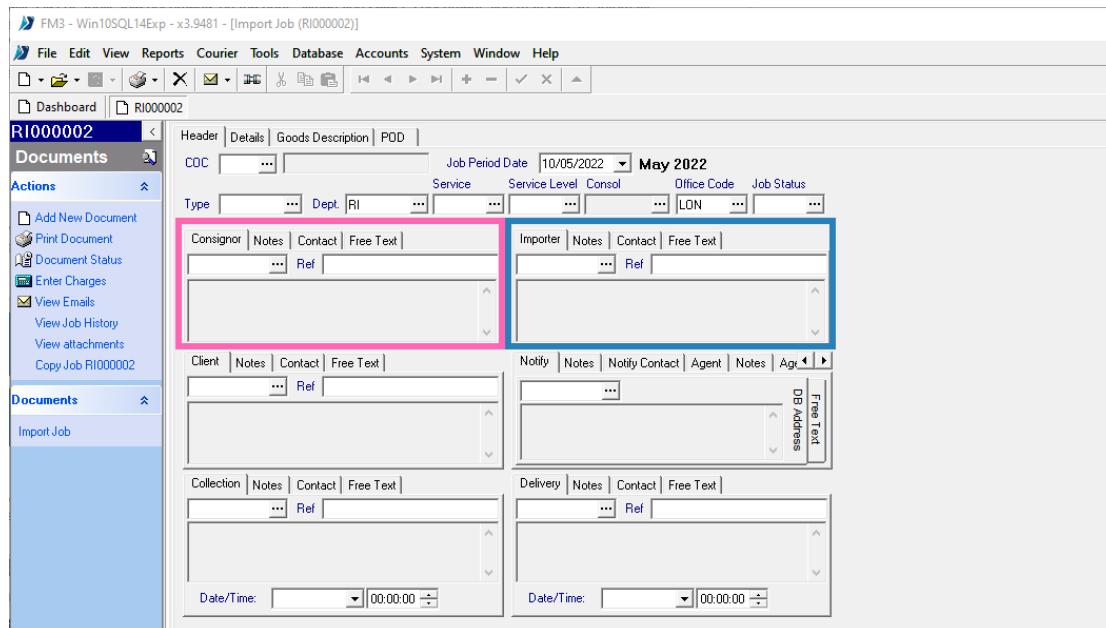
Collection Notes Contact Free Text

Delivery Notes Contact Free Text

Free Text

DB Address

FM3_UserGuideDB ADMIN ADMIN Checking for internal messages @ 11:50:38 09/05/2022 10:42:18 B:200920211646



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

File Edit View Reports Courier Tools Database Accounts System Window Help

Dashboard RI000002

RI000002

Header Details Goods Description POD

COC Job Period Date 10/05/2022 May 2022

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

Consignor Notes Contact Free Text

Importer Notes Contact Free Text

Client Notes Contact Free Text

Notify Notes Notify Contact Agent Notes Agt

Collection Notes Contact Free Text

Delivery Notes Contact Free Text

Free Text

DB Address

Date/Time: 00:00:00

Date/Time: 00:00:00

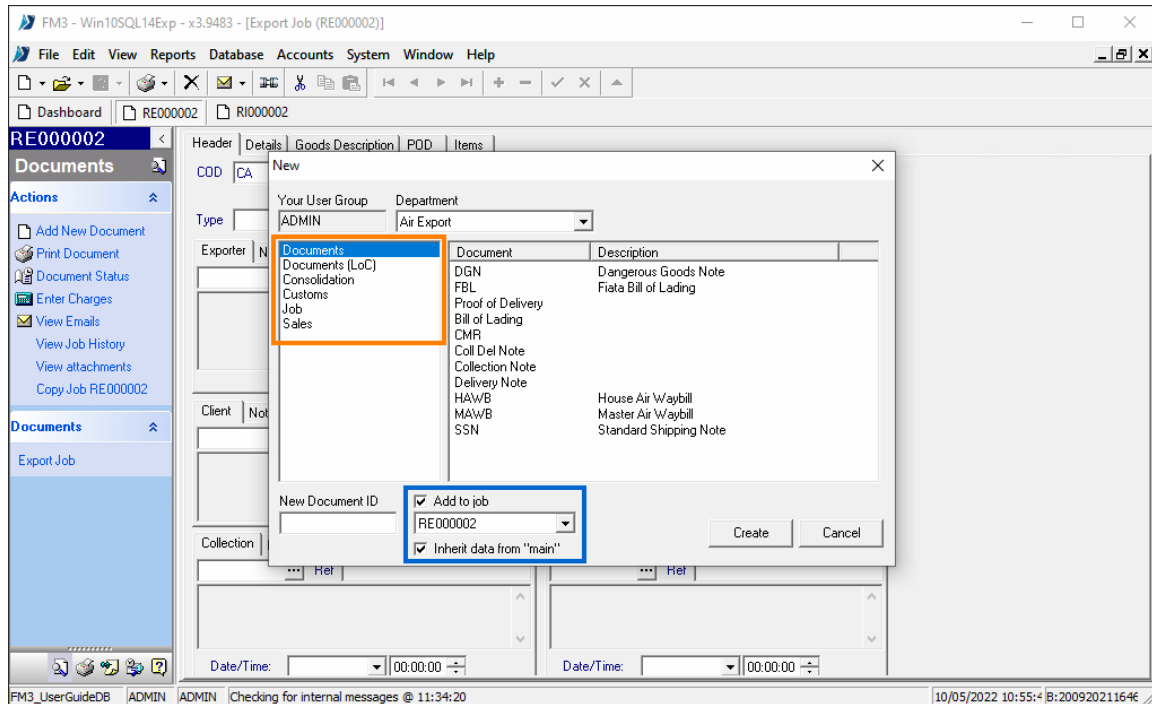
These fields also have pick lists, which will give access to the Address Editor entries.

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.

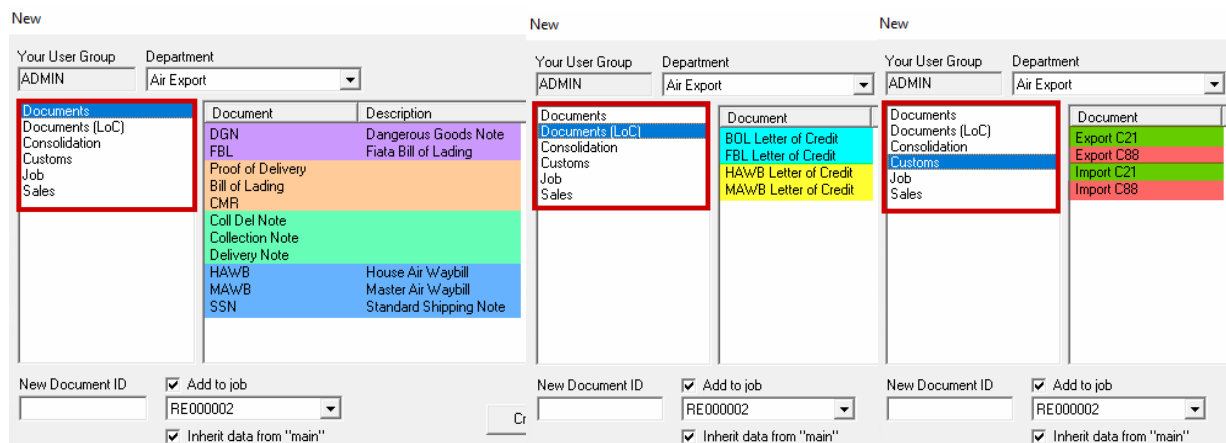


Document	Description
DGN	Dangerous Goods Note
FBL	Fiata Bill of Lading
Proof of Delivery	
Bill of Lading	
CMR	
Coll Del Note	
Collection Note	
Delivery Note	
HAWB	House Air Waybill
MAWB	Master Air Waybill
SSN	Standard Shipping Note

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.



Document	Description
DGN	Dangerous Goods Note
FBL	Fiata Bill of Lading
Proof of Delivery	
Bill of Lading	
CMR	
Coll Del Note	
Collection Note	
Delivery Note	
HAWB	House Air Waybill
MAWB	Master Air Waybill
SSN	Standard Shipping Note

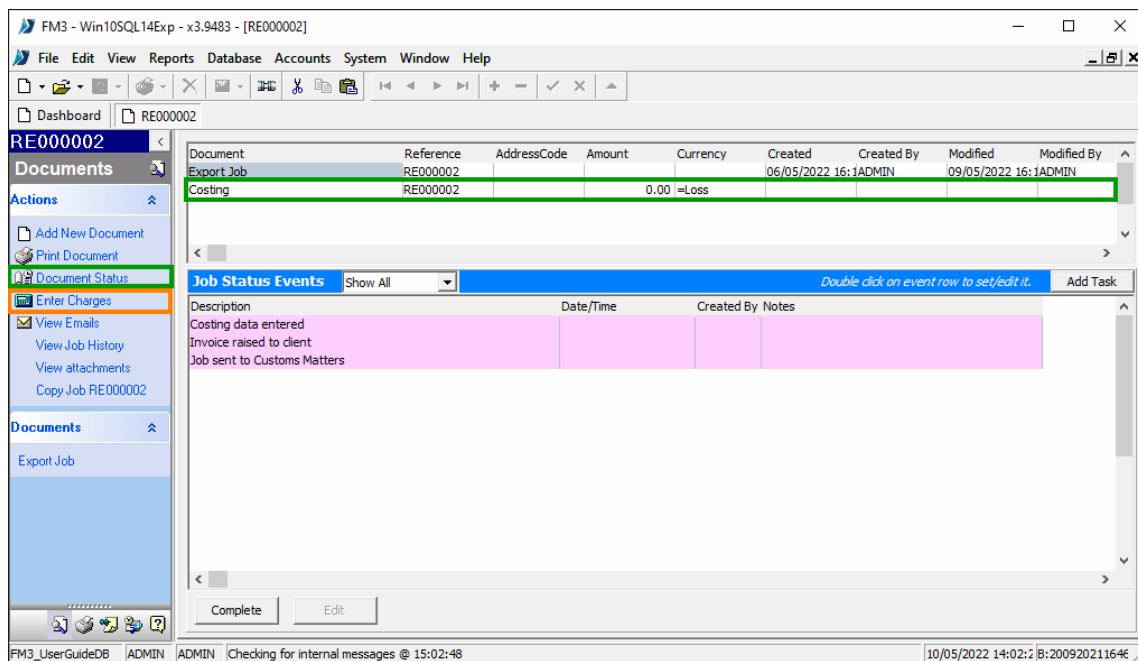
Document	Description
BOL Letter of Credit	
FBL Letter of Credit	
HAWB Letter of Credit	
MAWB Letter of Credit	

Document	Description
Export C21	
Export C88	
Import C21	
Import C88	

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

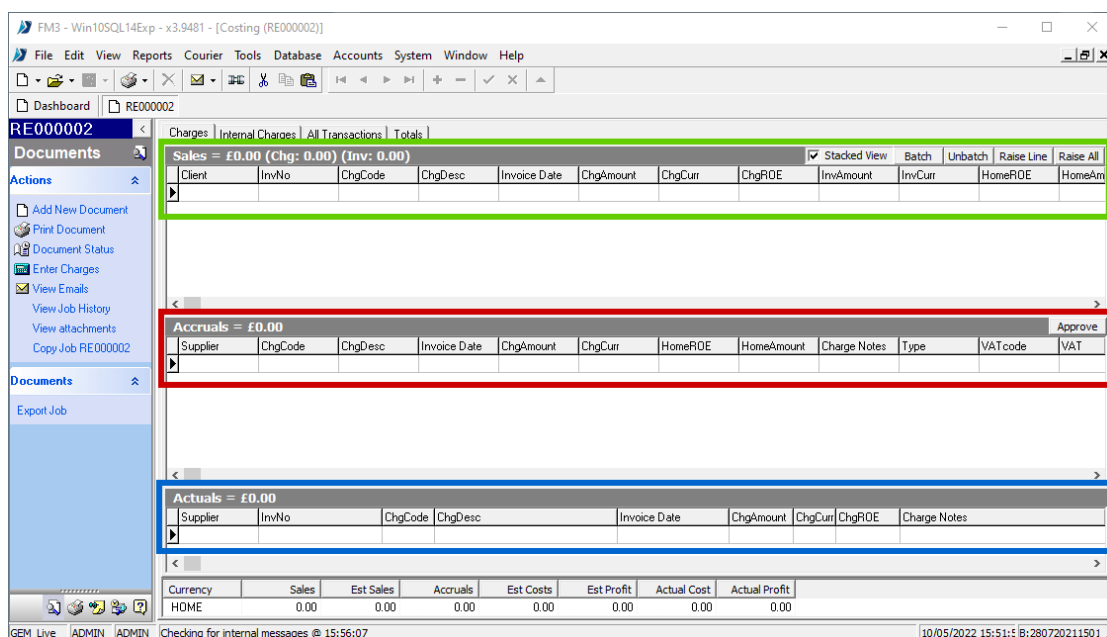
The financials of a job are compiled within a section called 'Costing'. This can be accessed through the 'Document Status' or 'Enter Charges'.



Document	Reference	AddressCode	Amount	Currency	Created	Created By	Modified	Modified By
Export Job	RE000002				06/05/2022 16:1	ADMIN	09/05/2022 16:1	ADMIN
Costing	RE000002		0.00	=Loss				

Description	Date/Time	Created By	Notes
Costing data entered			
Invoice raised to client			
Job sent to Customs Matters			

Blank costing page



Client	InvNo	ChgCode	ChgDesc	Invoice Date	ChgAmount	ChgCurr	ChgROE	InvAmount	InvCurr	HomeROE	HomeAm

Supplier	ChgCode	ChgDesc	Invoice Date	ChgAmount	ChgCurr	HomeROE	HomeAmount	Charge Notes	Type	VATcode	VAT

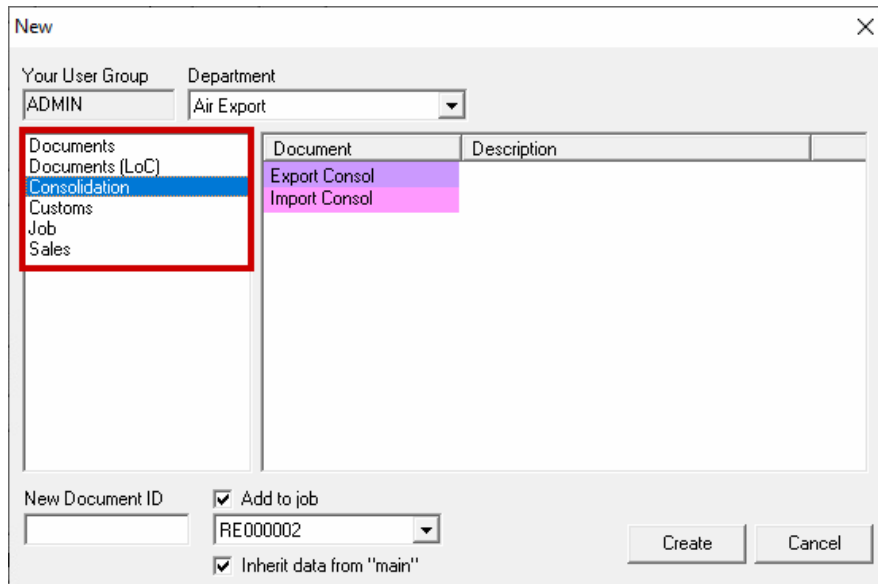
Supplier	InvNo	ChgCode	ChgDesc	Invoice Date	ChgAmount	ChgCurr	ChgROE	Charge Notes

Currency	Sales	Est Sales	Accruals	Est Costs	Est Profit	Actual Cost	Actual Profit
HOME	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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**.



New

Your User Group: ADMIN Department: Air Export

Documents: Documents, Documents (LoC), **Consolidation**, Customs, Job, Sales

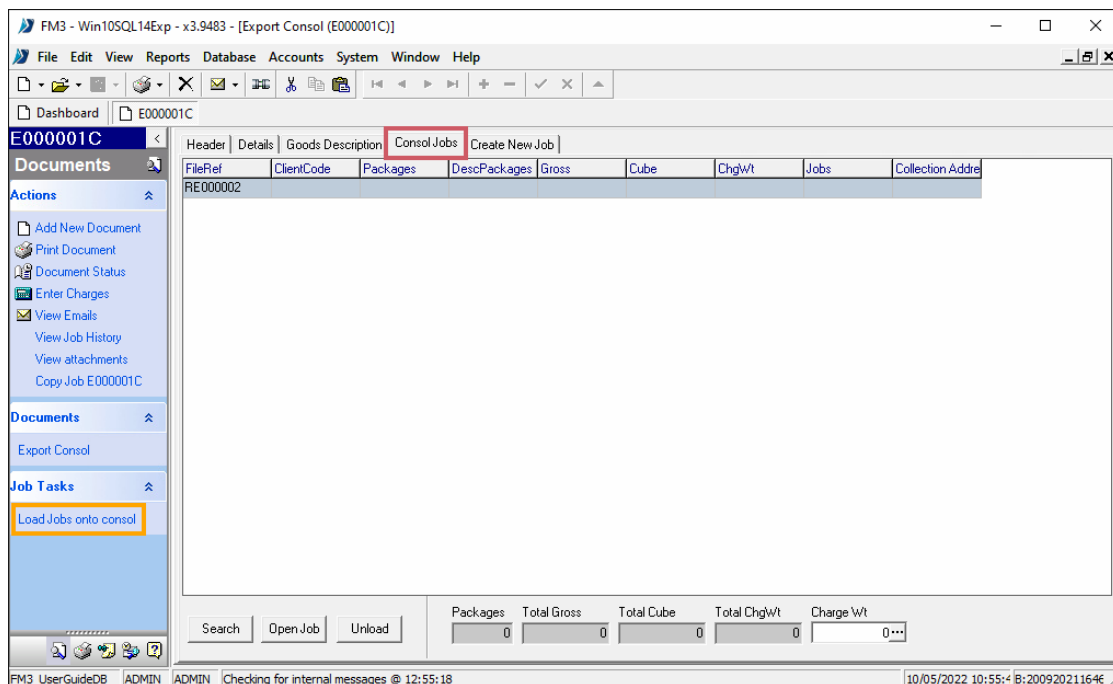
Document: Export Consol, Import Consol

Description:

New Document ID: Add to job: RE000002

☒ Inherit data from "main"

Create Cancel



FM3 - Win10SQL14Exp - x3.9483 - [Export Consol (E000001C)]

File Edit View Reports Database Accounts System Window Help

Dashboard E000001C

E000001C

Header Details Goods Description **Consol Jobs** Create New Job

Documents

Actions

- Add New Document
- Print Document
- Document Status
- Enter Charges
- View Emails
- View Job History
- View attachments
- Copy Job E000001C

Documents

- Export Consol

Job Tasks

- Load Jobs onto consol**

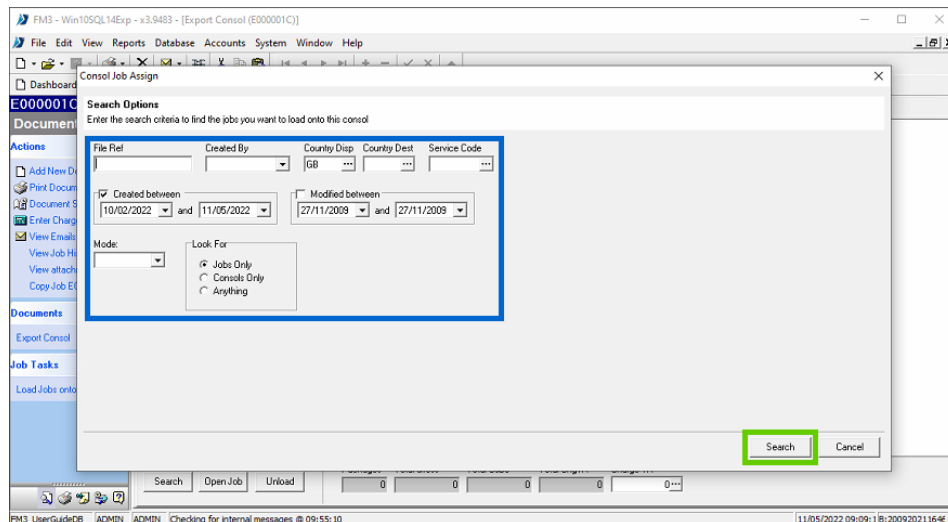
FileRef	ClientCode	Packages	DescPackages	Gross	Cube	ChgWt	Jobs	Collection Addr
RE000002								

Search Open Job Unload

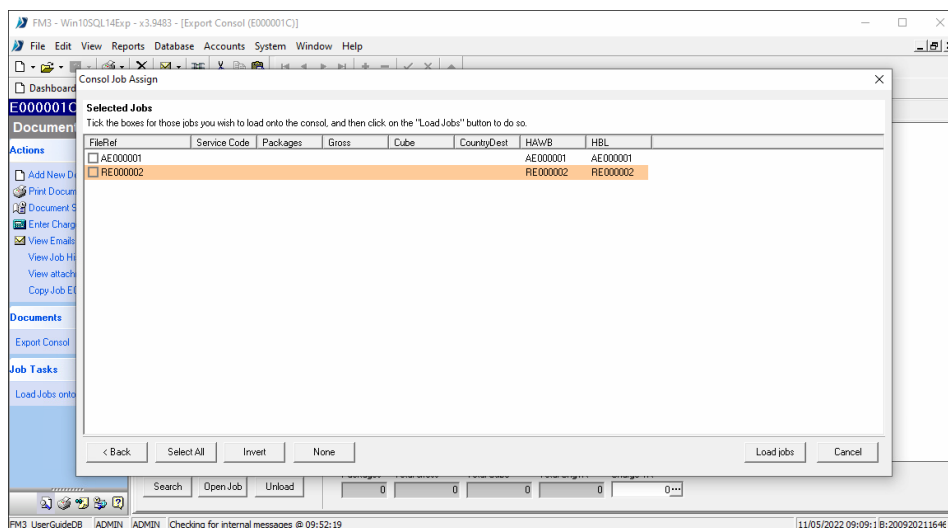
Packages: 0 Total Gross: 0 Total Cube: 0 Total ChgWt: 0 Charge Wt: 0...

FM3_UserGuideDB ADMIN ADMIN Checking for internal messages @ 12:55:18 10/05/2022 10:55:4 B:200920211646

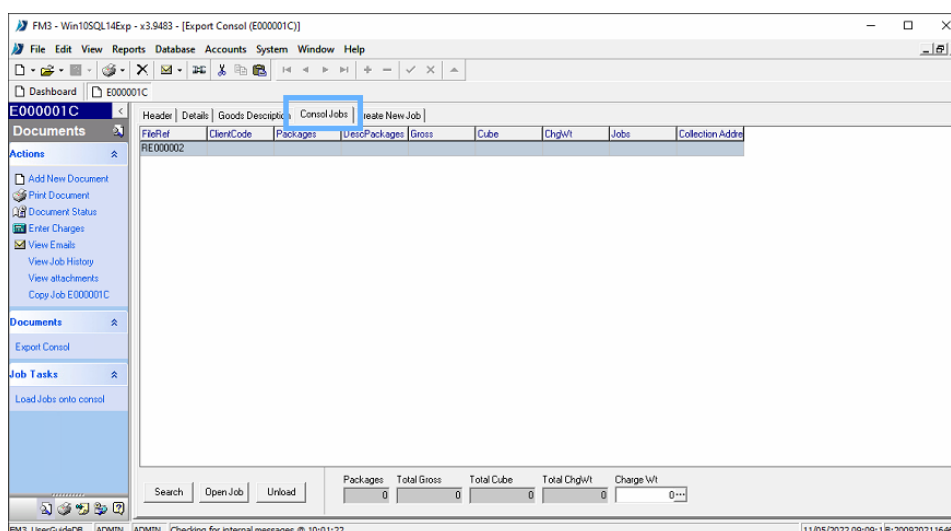
To add jobs to this Consol, click '**Load Jobs onto Consol**' and use the **search parameters** to find the specific jobs.



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.



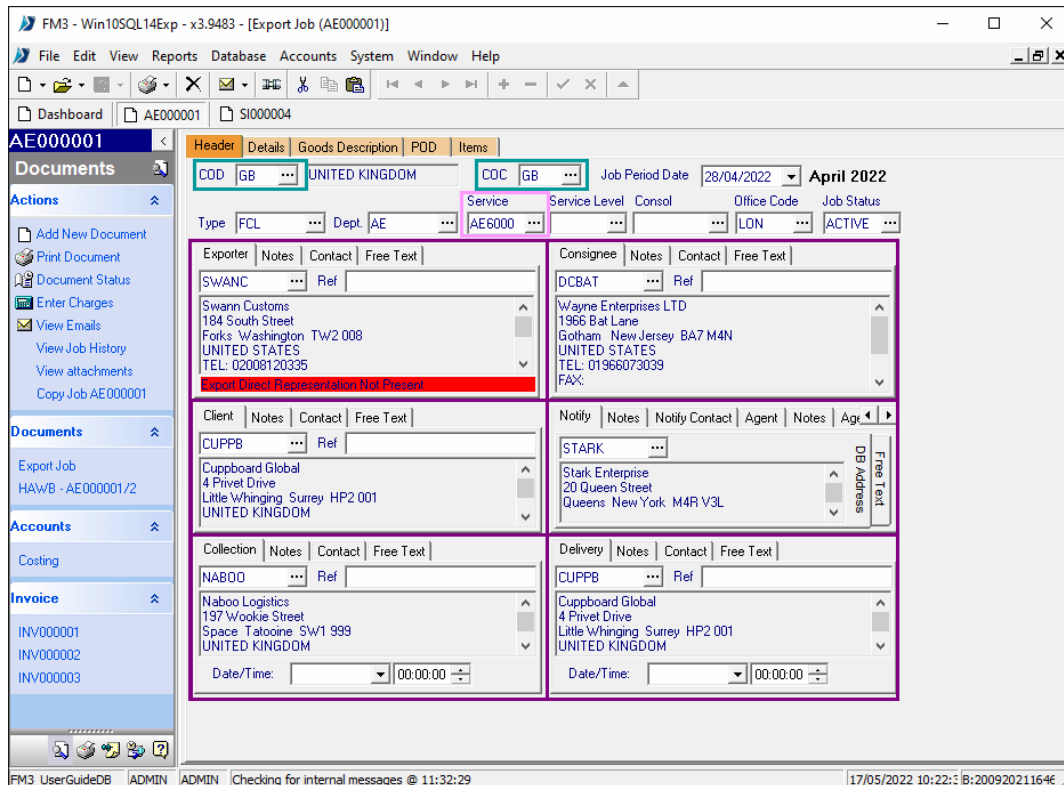
Once added all jobs will be in the **'Consol Jobs' tab**.



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.



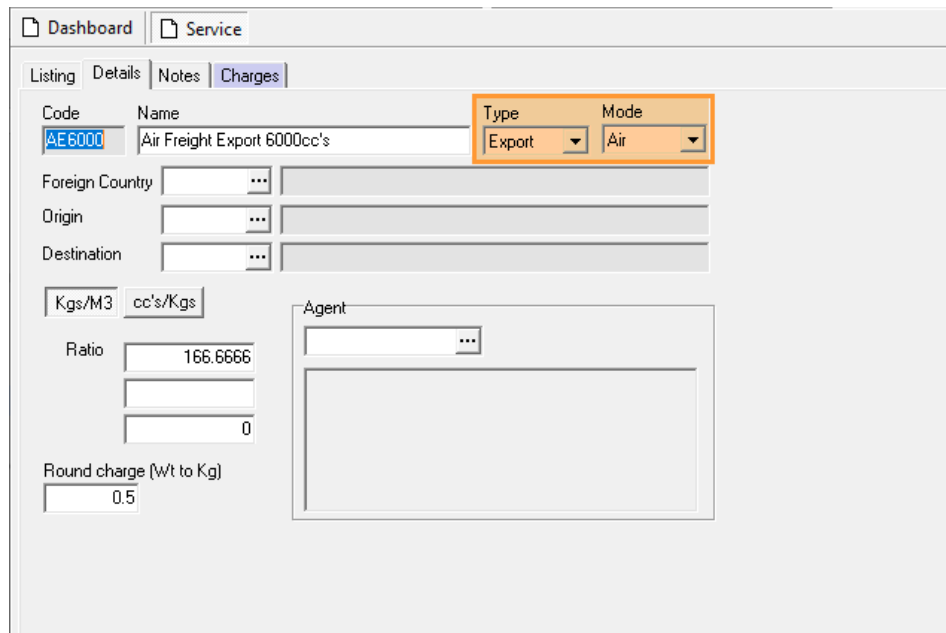
The screenshot shows the 'Header' tab of a job in the Sigma Freight Systems software. The job ID is AE000001. The 'COD' (Country of Delivery) is set to 'GB' and the 'COC' (Country of Collection) is also set to 'GB'. The 'Service' is 'AE6000'. The 'Job Period Date' is '28/04/2022' and the 'Job Status' is 'April 2022'. The 'Type' is 'FCL' and the 'Dept' is 'AE'. The 'Office Code' is 'LON' and the 'Job Status' is 'ACTIVE'. The 'Exporter' is 'Swann Customs' and the 'Consignee' is 'Wayne Enterprises LTD'. The 'Client' is 'Cupboard Global' and the 'Notify' is 'STARK'. The 'Collection' is 'Naboo Logistics' and the 'Delivery' is 'Cupboard Global'. The 'Date/Time' for both collection and delivery is '00:00:00'.

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.

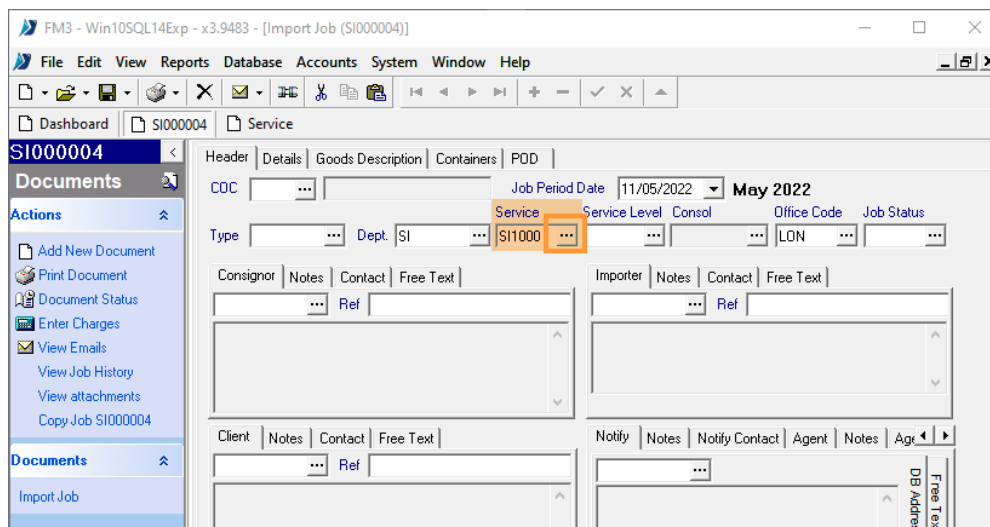
Additional information can be added to **roles** within a job, for example, the **Client’s** information can be brought up by using the code from Address Editor. This is the same with all roles within all job types.

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.

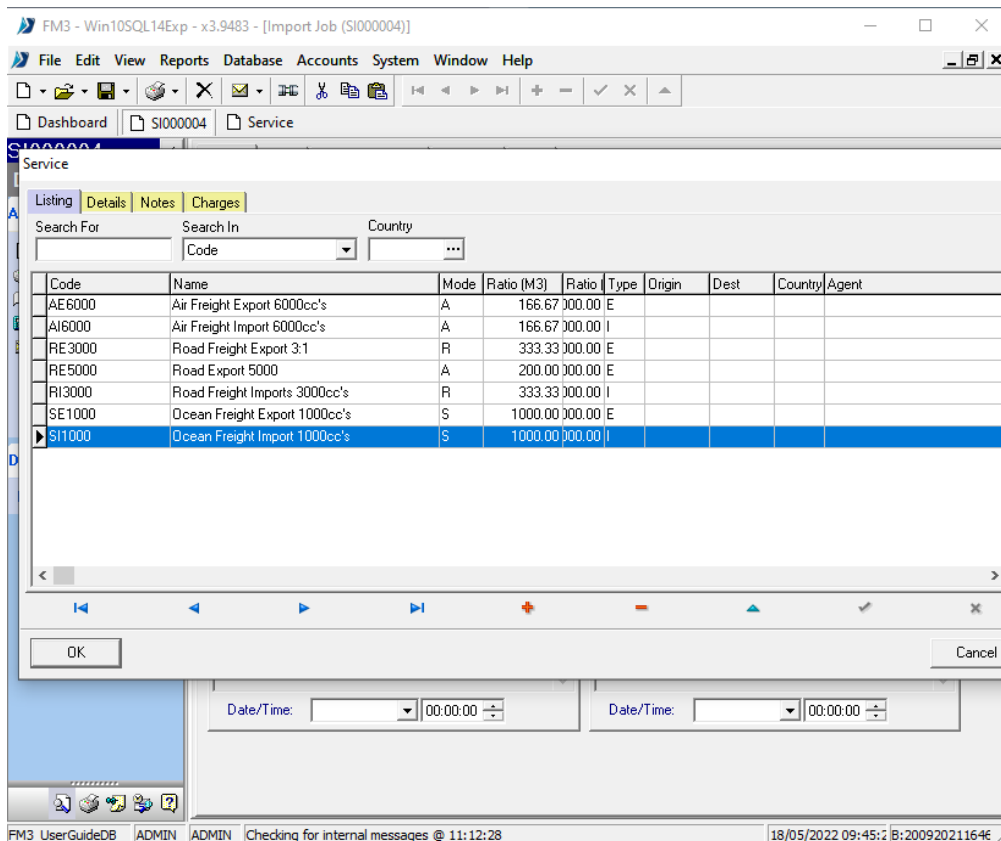


SERVICE CODES

Service Codes represent a specific service assigned to a job, for example, *SI1000*, 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 *SI1000*, the Type and Mode of the job will be changed, along with any charges added to the Charges Tab.

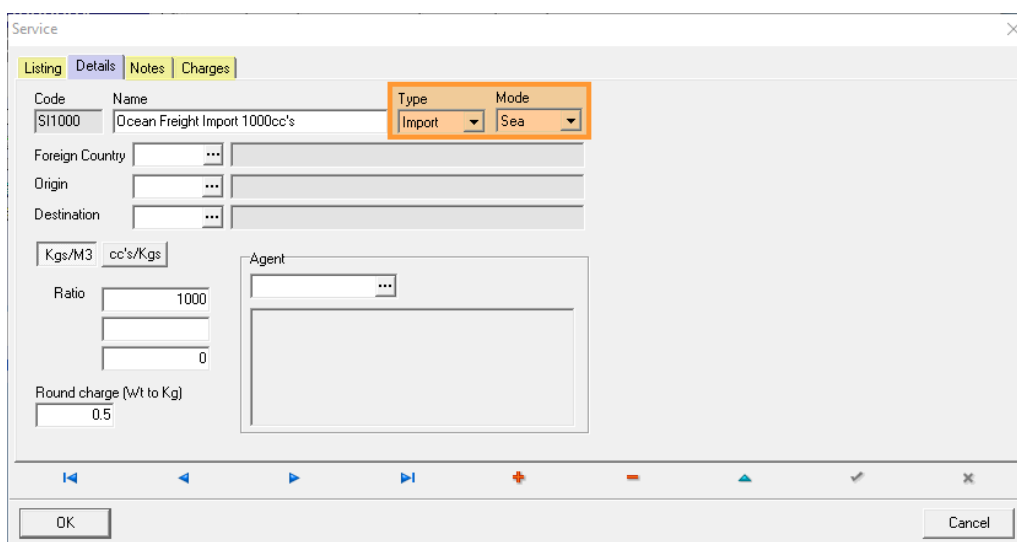


To access Service Code configuration, select the picklist '...' beside the Service Code box and find the code in [Listing](#).



Code	Name	Mode	Ratio (M3)	Ratio	Type	Origin	Dest	Country	Agent
AE6000	Air Freight Export 6000cc's	A	166.67	300.00	E				
AI6000	Air Freight Import 6000cc's	A	166.67	300.00	I				
RE3000	Road Freight Export 3:1	R	333.33	300.00	E				
RE5000	Road Export 5000	A	200.00	300.00	E				
RI3000	Road Freight Imports 3000cc's	R	333.33	300.00	I				
SE1000	Ocean Freight Export 1000cc's	S	1000.00	300.00	E				
SI1000	Ocean Freight Import 1000cc's	S	1000.00	300.00	I				

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.



Code: SI1000 Name: Ocean Freight Import 1000cc's

Foreign Country: ...

Origin: ...

Destination: ...

Kgs/M3: ... cc's/Kgs: ...

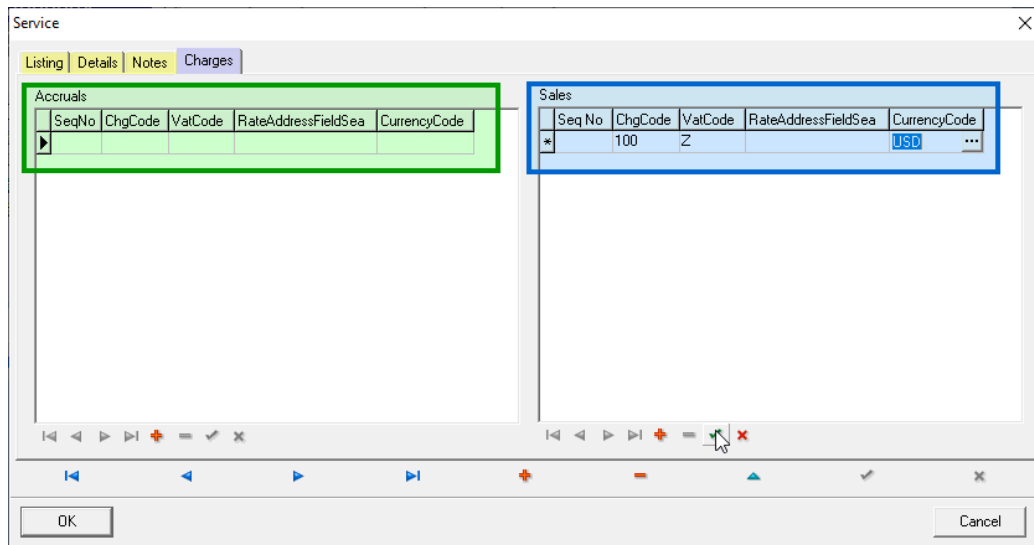
Ratio: 1000

Round charge (Wt to Kg): 0.5

Agent: ...

Type: Import Mode: Sea

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.

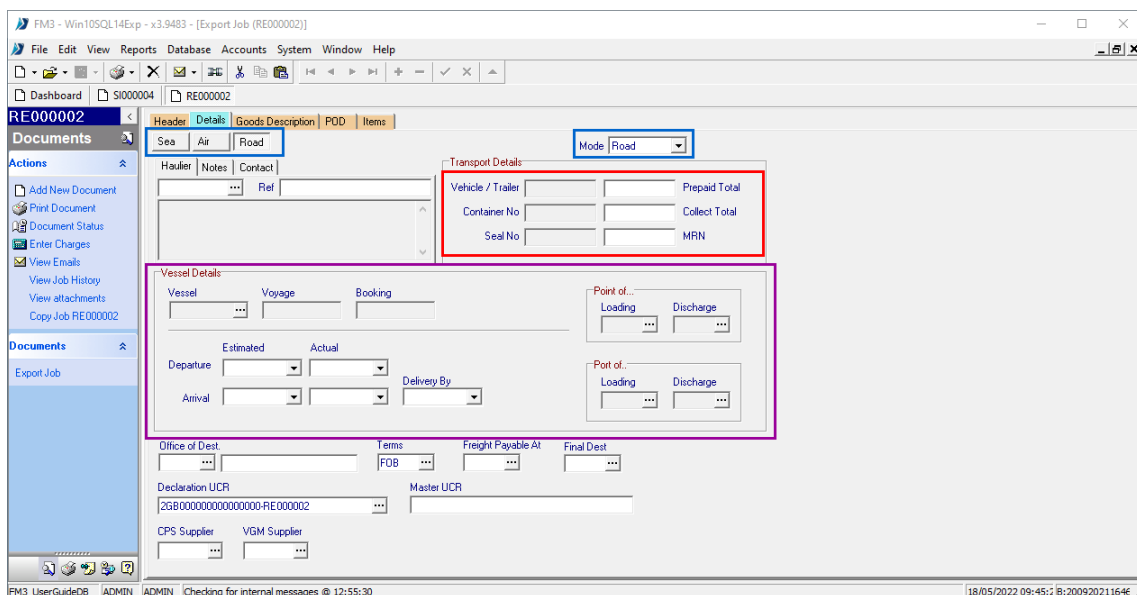


The screenshot shows the 'Service' window with two tabs: 'Listing' and 'Details'. The 'Listing' tab is active, showing two grids: 'Accruals' and 'Sales'. The 'Accruals' grid is empty and highlighted with a green border. The 'Sales' grid contains one entry with 'Seq No' 100, 'Chg Code' Z, and 'Currency Code' USD, highlighted with a blue border. The window has a standard toolbar with navigation and action buttons, and 'OK' and 'Cancel' buttons at the bottom.

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.

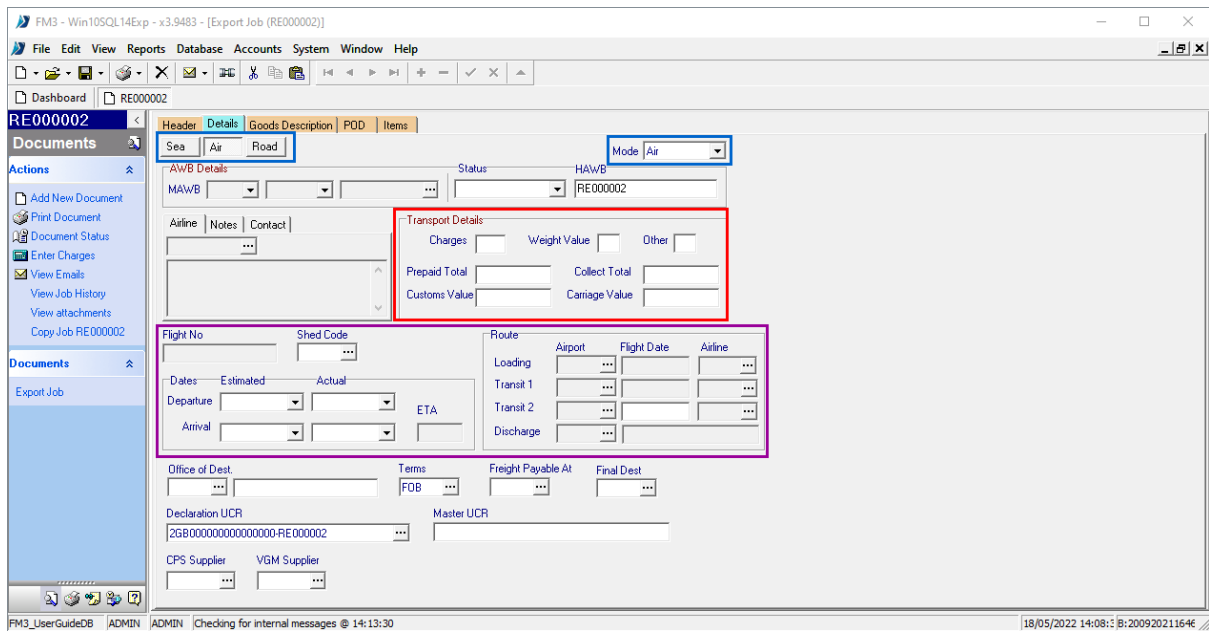


The screenshot shows the 'Details' page of the FMS application. The 'Mode' dropdown is set to 'Road'. The 'Transport Details' section includes fields for 'Vehicle / Trailer', 'Container No', 'Seal No', 'Prepaid Total', 'Collect Total', and 'MRN'. The 'Vessel Details' section includes fields for 'Vessel', 'Voyage', 'Booking', 'Departure', 'Arrival', 'Delivery By', 'Point of...', and 'Port of...'. The 'Office of Dest', 'Terms', 'Freight Payable At', and 'Final Dest' fields are also visible. The 'Declaration UCR' and 'Master UCR' fields are at the bottom. The window has a standard toolbar and a status bar at the bottom.

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.

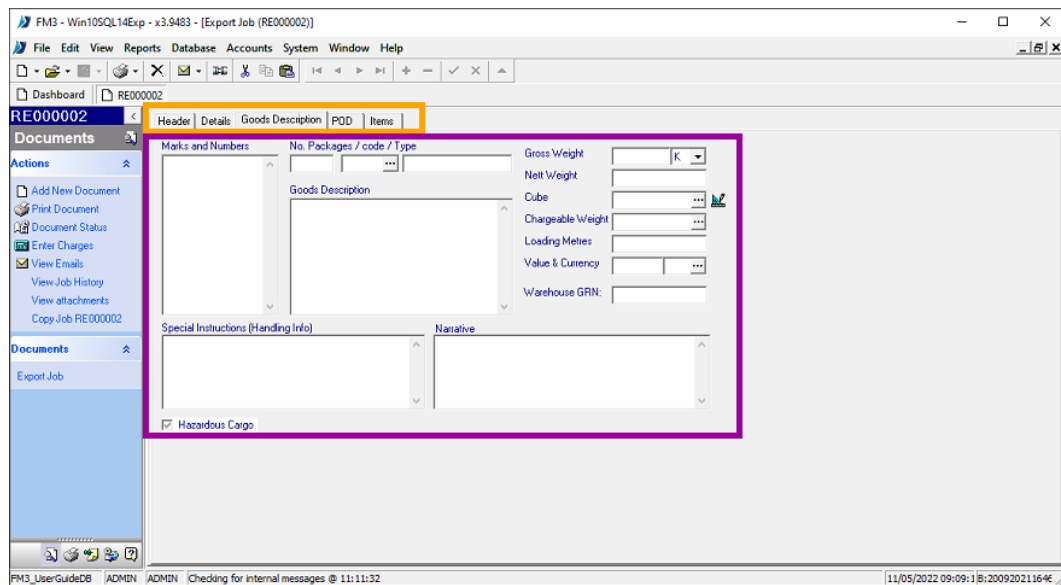
In road jobs, fields such as '**Vehicle**' and '**Container No**' are under **Transport Details**, however, if we change the mode and select 'Air', the Transport Detail fields are different.

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.