

Job Status Event - User Guide

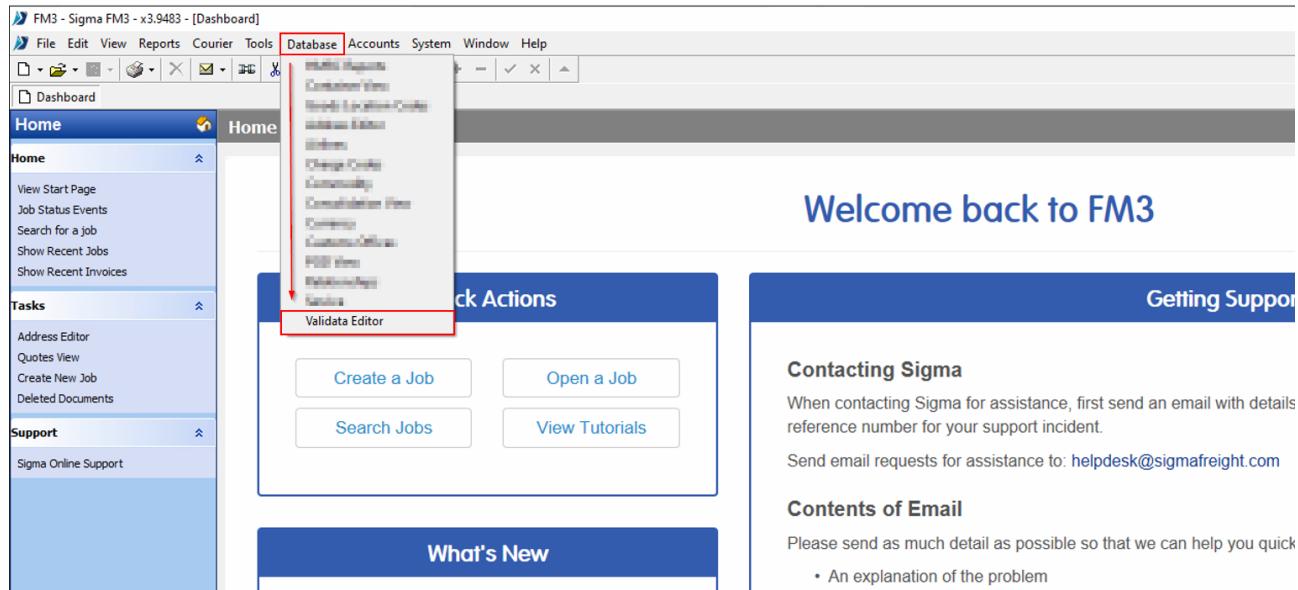
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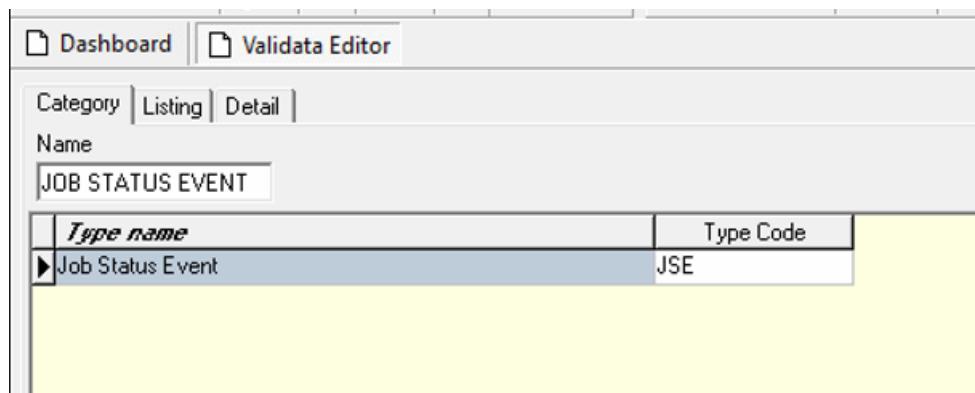
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CREATE EVENTS

To Create your events head to Validata Editor which can be found under the Database tab at the top of the page.



Once there either select from the list or search for job status event and head to the listing.



The listing will show you all the events you have set up. The listing is to be viewed in connection with the details tab.

| Code | Description | String | Number | String1 | String2 | String3 | String4 | String5 | Job |
|----------|--------------------------|--------|--------|---------|---------|---------|---------|---------|-----|
| COSTINGS | ADD CONSTINGS TO JOB | | 2.00 | | | | | | |
| FILL | FILL THE JOB WITH VALUES | | 1.00 | | | | | | |
| INVOICE | INVOICE THE JOB | | 50.00 | | | | | | |

The screenshot shows the 'Detail' tab of the Validata Editor. The 'Code' field contains 'COSTINGS' and the 'Description' field contains 'ADD CONSTINGS TO JOB'. Below these fields are dropdown menus for 'Mode(s)', 'Country (COC)', 'Country (COD)', 'Department', 'ServiceCode', and 'Applicable To' (set to 'Job'). The 'Sort Order' is set to '2'.

Adding events works the same as adding records in other areas of FM either using the tool bar at the top or the navigation bar at the bottom to add, complete and delete records. Once completed press the tick icon to save the record.

The mandatory value to fill out is the CODE you can then add a description that suits its indented event. the other values determine their appearance on jobs.

Mode(s) - Column name is String

- Mode is the mode of the job and will be able to select from A(air), R(road) and S(sea) can select 1, 2 or all three(leaving it blank will assume all 3).
- The event will only appear on jobs that share the same mode i.e. if above had A then event would only appear on air jobs.

Country(COC) - Listing Column name is String1

- The event will only appear when the selected COC is on the job.

Country(COD) - Listing Column name is String2

- The event will only appear when the selected COD is on the job.

Department - Listing Column name is String3

- The event will only appear when the selected Department is on the job.

Service Code - Listing Column name is String4

- The event will only appear when the selected Service Code is on the job.

Applicable Job - Listing Column name is String5

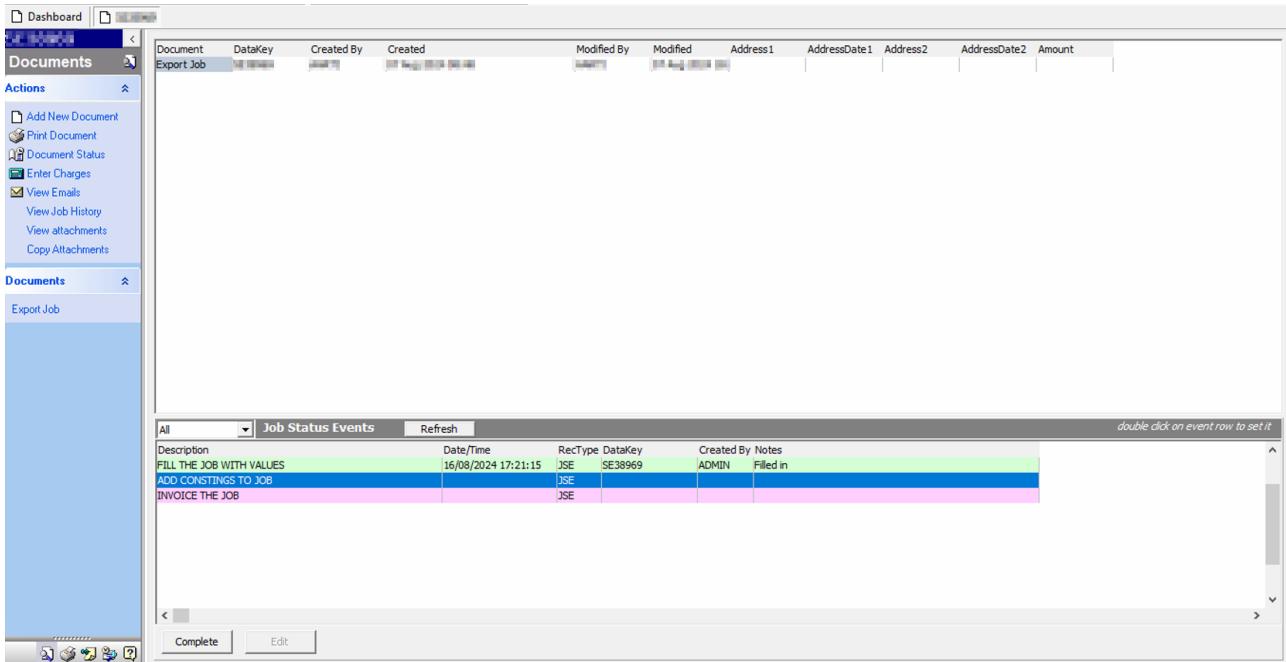
- The event will only appear if the job matches the selected job. Choice of Job or Quote (leave blank for Both)

Sort Order - Listing Column name is Number

- This determines the order of events the lowest number first the highest last. Example above shows Fill with 1 and costing with 2 this means that the Fill event will come before the Costing Event.

DOCUMENT STATUS

On the Quote or Job when opened will show on the document status available in the left hand side of the screen.



The screenshot shows a software interface for managing job status events. On the left, a sidebar menu includes 'Dashboard', 'Documents' (selected), 'Actions' (with options like 'Add New Document', 'Print Document', 'Document Status', 'Enter Charges', 'View Emails', 'View Job History', 'View attachments', and 'Copy Attachments'), and a 'Documents' section for the current 'Export Job'. The main area displays a table of 'Job Status Events' with the following data:

| Description | Date/Time | RecType | DataKey | Created By | Notes |
|--------------------------|---------------------|---------|---------|------------|----------|
| FILL THE JOB WITH VALUES | 16/08/2024 17:21:15 | JSE | SE38969 | ADMIN | Filed in |
| ADD CONSTINGS TO JOB | | JSE | | | |
| INVOICE THE JOB | | JSE | | | |

At the bottom, there are 'Complete' and 'Edit' buttons. A note at the top right of the event table says 'double click on event row to set it'.

It will order dependant of the sort order given in validata editor. You can complete the events by double-clicking the row or using the complete button on a selected row. Completing the event will mark it green and give a date and time of completion as well as giving you the option to add a note which can be edited.

Dashboard Job Status Event

On the Dashboard will be the option of Job Status Events here you can view jobs within a given search and see what event is due next. If an event is completed then this will mark the last event completed as well.

Job Status Event - User Guide

Dashboard

Home

Job Status Events

Job Type: Next Event: Jobs Created By: Search For: Search In: Search Date: From: To:

? All (all) (Anyone) FileRef Created 01/08/2024 31/08/2024

| FileRef / AdmCo | DataKey | ClientCode | Client Name | Next Event / Task | LastEventTime | LastEventDesc | CountOfEvents | CountOfAvailable | Deadline Date | Origin | Dest | Dept | RecType |
|-----------------|------------|------------|------------------|--------------------------|---------------|---------------|---------------|------------------|---------------|--------|------|------|---------|
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | US | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | AU | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | TR | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | TK | GB | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | TK | GB | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | TR | TR | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | KE | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | TR | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | AU | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | TR | GB | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | ZA | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | ZA | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | ZA | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | TR | GB | SE | Job | |
| 1234567890 | 1234567890 | DEMO | DEMO COMPANY LTD | FILL THE JOB WITH VALUES | | | 3 | 3 | GB | | SE | Job | |

Job Status Events

All

| Description | Date/Time | Notes |
|--------------------------|-----------|-------|
| FILL THE JOB WITH VALUES | | |
| ADD CONSTINGS TO JOB | | |
| INVOICE THE JOB | | |

double click on event row to set