Tasks and warehouse

Booking manager provides management of articles, workshops, warehouses, stocked articles on warehouse, activities and tasks that are performed on certain yacht. All these modules together form a whole that greatly improves the tracking of items in stock and maintenance management of the yacht. Additionally, separate CBM module provides direct access to defined tasks and different possibilities of access for administrators, workers and yacht owners.

In order to more effectively take advantage of listed modules you must perform some preparatory actions. For example, monitoring the execution of tasks relies on the activities and articles that can be added on these tasks. Thus, before usage of Tasks Editor it is necessary to add activities and articles that will be applied in a particular task.

Used modules:

- User groups

- Task category editor

- Activities editor

- Articles editor

- Workshops/Warehouses editor

- Warehouses

- Tasks editor

- CBM module

It is recommended to go through the modules in order in which they are stated to provide all needed information when moving to the next module.

1. User groups

Preferences → User groups

There is a possibility in the "User groups" to define default staff group and default suppliers group (Fig. 1).

Default staff group - users that are added to this group are shown as workers in the Task editor. The workers are persons who perform certain tasks and they can not be selected if default staff group is set or if there are no users added to that group.

Default suppliers group - users that are added to this group appear as suppliers of articles in Articles editor. One supplier can be assigned to each article and it will not be possible if default suppliers group is not set or if there is no users in that group.
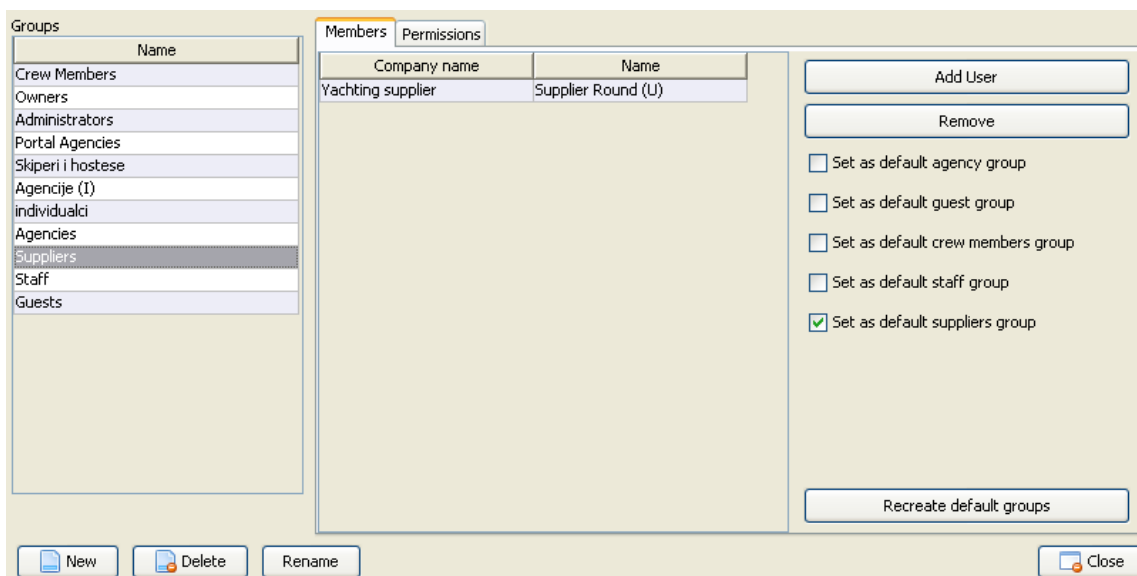
Figure 1. Default staff and suppliers group

1.1. Permissions

Recommended for advanced users only! For more information or questions please contact support@mmksystems.com.

Workers can have access to their own tasks and owners can have access to the tasks that are carried out on their yachts thru CBM module only if proper permissions are set for individual user groups. Setting permissions is done in "Permissions" tab by selecting "Task" module.

Workers (Staff)

It is necessary to allow read (READ) and manage (MANAGE) right in "Task" module.

Owners (Owners)

It is necessary to allow read (READ) and owner (OWNER) right in "Task" module.

2. Task category editor

Maintenance → Task category editor

Task categories are used in definition of tasks in task editor where task category can be assigned to each task. If there are no categories defined in task category editor then it will not be possible to assign category to certain task.
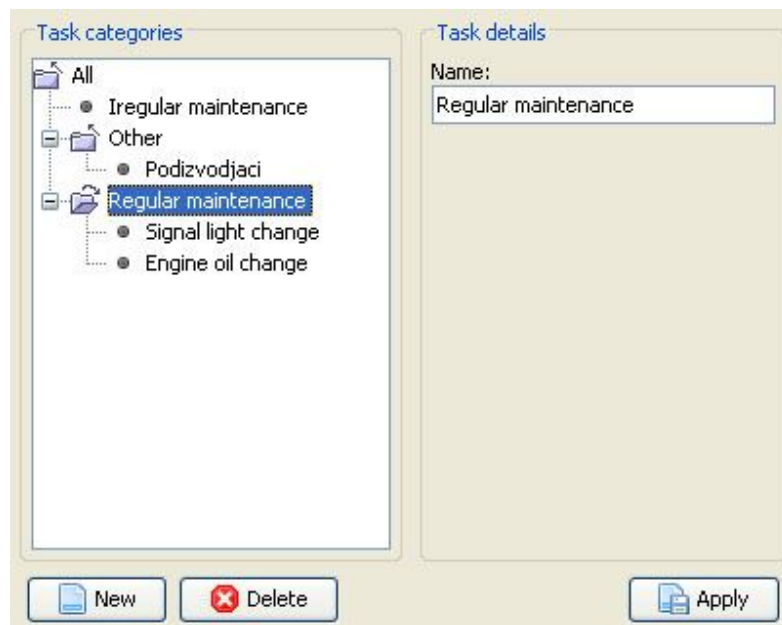

Figure 2. Task category editor

Each category can be assigned a name and parent category to which it belongs (Fig. 2). Name of the category is entered in the field on the right side whereby category for which we want to change the name has to be selected in the tree view on the left side of the window. Definition of the categories and subcategories is done by simply draging and dropping one of the categories to another category in the tree.

3. Activities editor

Maintenance → Activities editor

In activities editor we define activities that are added to each task. Each task consists of several activities such as, for example, replacing light bulbs, cleaning, changing the engine oil and the like.

For each activity we can define its name, the number of hours that need to be spent on carrying out the activity, the cost of execution per hour, currency and an additional remark (Fig. 3).

Figure 3. Activities editor

Activities can be filtered by certain category, code and name.

4. Articles editor

Maintenance → Articles editor

In articles editor we define articles that will be added to certain warehouses. Articles are defined with their name, price, currency and unit. Each article can have a supplier that was previously assigned to default suppliers group. Also, for each article you can write a note associated with it (Fig. 4).

Figure 4. Articles editor

Articles can be filtered by their code, name and supplier.

5. Workshops/Warehouses editor

Maintenance → Workshops/Warehouses editor

This module defines the warehouses and workshops. When creating a new record you can select if the new record will be a warehouse or workshop. Each of them is defined with the name, address and city where located, code and country (Fig. 5).

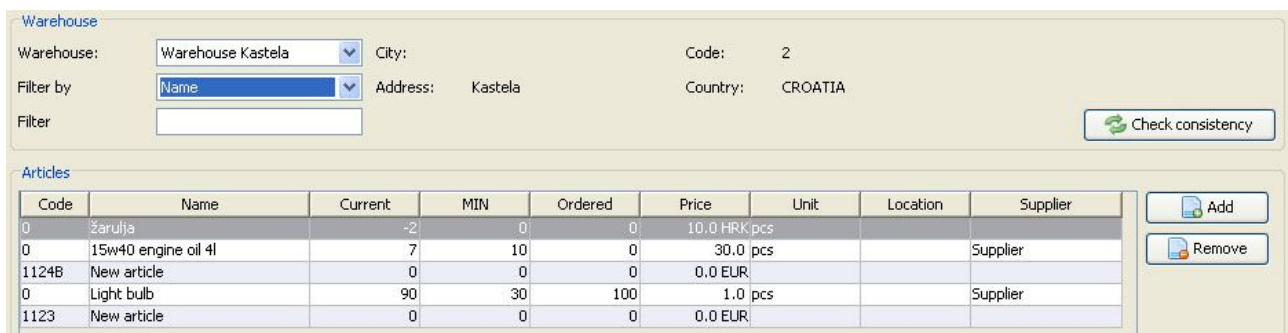Figure 5. Workshops/Warehouses editor

6. Warehouses

Maintenance → Warehouses

Warehouse module displays all defined warehouses and articles that are assigned to particular warehouse. It is possible to choose from all warehouses that were created in Workshops/Warehouses editor.

Articles can be added or deleted by pressing the right side buttons. Each article is shown with its name, the current state of the stock, the minimum amount that should be available, ordered quantity, price, unit, location in the warehouse and the supplier (Fig. 6).

All these parameters of an individual article can be further reviewed and adjusted except for supplier, which should be selected in Articles editor for each article, and for current amount in stock. The current amount is determined by the actions carried out in the Tasks editor that will be explained later. If you add article on certain task, it will be removed from the warehouse in moment of deduction, i.e. its current amount will be reduced by the amount that was deducted on a particular task.

To fill the warehouse with articles you need to define specific tasks in the task editor that will add articles and whose quantity will be presented with a negative value.

Figure 6. Warehouses

It is possible to verify consistency of each warehouse in which case all tasks that contain articles from certain warehouse are being checked and article's current state is calculated based on deducted articles on each task. This action is recommended to use in daily or weekly basis in case of actions against warehouses from the large amount of concurrent users.

Articles in the warehouse can be additionally filtered by their code, name, location and supplier.

7. Tasks Editor

Maintenance → Tasks Editor

Tasks editor module is used to define the tasks that will be carried out on yachts and on warehouse articles. Tasks are presented in a table form and can be filtered by the year in which it was intended to start, by status in which they are and by workshop, yacht, category, worker, description and date on which task was created, date when task was finished etc. (Fig. 7).
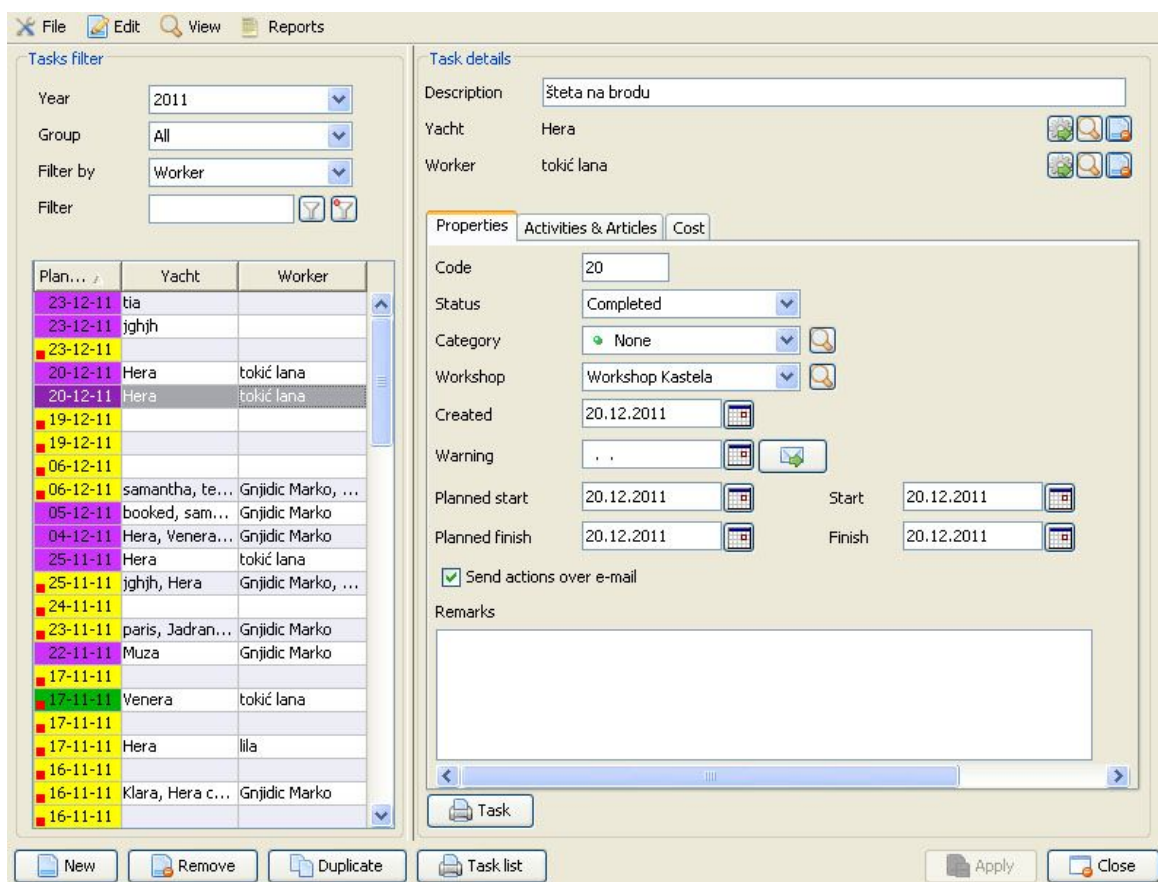

Figure 7. Tasks Editor

There are following task statuses:

- Planned task

- Task in progress

- Completed task

You can create new task, delete the existing and duplicate the selected task. Duplication can be done in two ways:

- Single task - the task is fully duplicated with all its parameters

- To all yachts - the task will be duplicated on all yachts that are enabled for tasks in the Yachts editor (Work → Yachts → Properties → Enable for tasks)

Each task can assign:

- Description - The description of the task

- Yacht – yacht (or multiple yachts) on which task will be executed

- Worker - a worker (or multiple workers) from default staff group who will perform the task

7.1. Properties

Figure 8. Task properties

- Code - arbitrary code for your task. System will automatically apply next available code upon new task creation

- Status - the current status of the task which can be planned, in progress or completed

- Category - previously defined categories in the Task category editor

- Workshop - workshops previously defined in the Workshops/Warehouses editor in which to perform the task

- Created - the date when the task is created

- Warning - the date when the user will be warned about an upcoming assignment. Pressing the button (Fig. 8) you can send messages to workers with all the parameters of the task which is to be performed. In addition, it is possible to define a message in the Message settings (Preferences → Message settings → E-mail task warning)

- Planned start - the date when it is planned to start the task

- Start - the real beginning of task execution. If the task does not start on time it will be visible to the user in a table view. Overdue task will have red square marker.

- Planned finish - date when completion is planned

- Finish - the actual completion of task execution. If the task does not finish on time it will be visible to the user in a table view. Overdue task will have red square marker.

- Send actions over e-mail - if this option is selected the user will receive notification messages when a worker at the CBM starts and finishes the task.

- Remarks - additional notes related to the task

7.2. Activities and articles

Finished	Type	Code	Name	Price	Amount	Unit	Worker	Warehouse	Finish date	Note
☐	Activity	0	pregled broda	180.0 HRK	8	-		-	01-01-70	
☑	Activity	sdf53	New activity	0.0 EUR	0	-		-	01-02-12	
☑	Activity	0	promjena žarulje	10.0	1	-		-	01-02-12	
	Article	1124B	New article	0.0 EUR	0			Warehouse...		
	Article	1123	New article	0.0 EUR	0			Warehouse...		

Figure 9. Task activities and articles

This section defines the activities that need to be made so the task can be successfully finished and the articles which will be used (Fig. 9). Activities and articles first need to be defined in Activities/Articles editor, as previously described, in order to be able to assign them to the task. Regardless of how a certain activity or articles is defined it can be further changed when it is applied to the task. In this way you can quickly and

efficiently add activities and articles whose price or work hours relatively frequently change without the need of constant changes in Activity/Article editor or duplication of the same activity or article that has different parameters.

Each activity and article can be assigned to certain worker who will carry out that activity/article. If specific worker isn't assigned it means that this activity will be carried out by all workers which are added to the task or the article has been used by all of them.

Each activity can be defined as finished and the date of completion can be assigned regardless of the completion date of the task.

Individual article is added in such way that it is selected from a warehouse, which we have previously defined and where we assigned its articles.

Once you have selected the articles and entered the quantity and possibly corrected the price, they should be deducted from the warehouse so the article can be taken off and warehouse stock can be updated. If some of already deducted articles you want to return to the warehouse, because it will not be used to perform the task, you must select the "Return" button and article will be returned to the warehouse. When the article is deducted from the warehouse it can not be changed or deleted. In order to change it you first need to return it back to the warehouse.

It is important to emphasize that the current amount of articles can not be manually defined in the warehouse but have to be added thru the tasks. This can be done in a way that, for example, you define a task called "Adding articles to the warehouse". Then you assign articles to this task and set theirs amount to a negative value. For example, if we want to add 50 light bulbs in a warehouse, we set the amount of this article at -50 and deduct it from the warehouse. Then 50 light bulbs will be added to the warehouse.

7.3. Cost

Figure 10. Task cost

Task costs are shown on "Cost" tab and they can be automatically calculated by pressing the "Calculate duration and price" button (Fig. 10). Automatic calculation method takes into account the duration and cost of all activities and the amount and price of all articles that are assigned to the task.
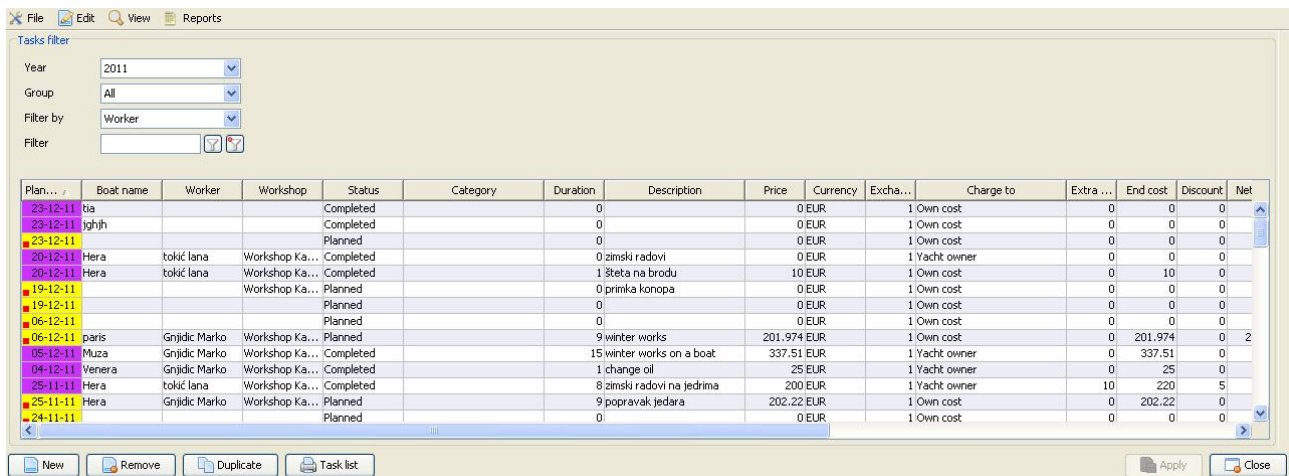
- Duration (h) - a total duration of the task in hours

- Price - the basic price of the task

- Charge to - select who will be charged the cost of the task. You can choose own cost, yacht owner and included in maintenance.

- Extra cost - percentage of additional cost

- Discount - discount amount as a percentage

- Tax - the amount of tax as a percentage

If you click on the "Invoice" button system will automatically create new custom reservation for you with all costs that are contained in this task. You can decide if you want to show only total amount on the invoice or all activities and articles costs. This option is located in Preferences->Reservation settings->Invoice->Create invoice from task with the total amount. Additionally, if you choose to charge this task to the owner

then the owner will be automatically selected from the addressbook and applied to this custom reservation. When new invoice has been created you can view it or print it directly from the task. Once the invoice has been produced for certain task you can't produce another invoice for this task.

7.4. Extended view

The look of the task editor can be changed so that it shows all tasks in table view. This view can be turned on in the main menu by choosing "View"->"Switch view" (Fig. 11).

Figure 11. Task editor extended view

8. Reports

8.1. Tasks report

All tasks can be printed in detailed reports if you choose one of the printing buttons shown in Figure 12.
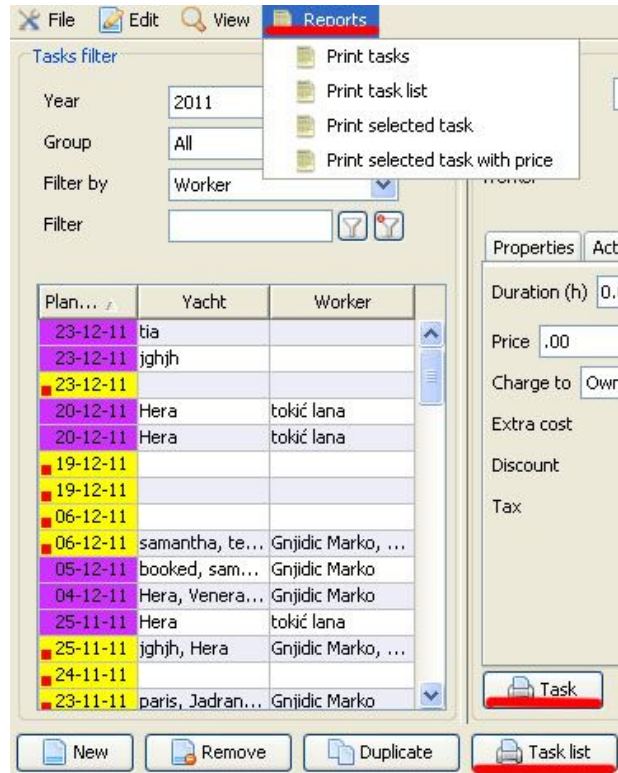
Figure 12. Print report

If you select button "Task" detailed info about currently selected task will be printed with all activities and articles that are assigned to this task.

If you select "Task list" button system will print the list of tasks that are selected in the table and you can select what type of report you would like to print.

If you create a report from the top menu you can create it in a 4 different ways:

- Print tasks: detailed report of all tasks with a possibility to choose a type of report and filtering.

- Print task list: printing the list of tasks selected in the table (identical behaviour as "Task list" button).

- Print selected task: automatic detailed report of the selected task with all activities and articles.

- Print selected task with price: automatic detailed report of the selected task with activities, articles and all prices for each of them.

If you select "Print tasks" system will show you a window in which you can finely tune
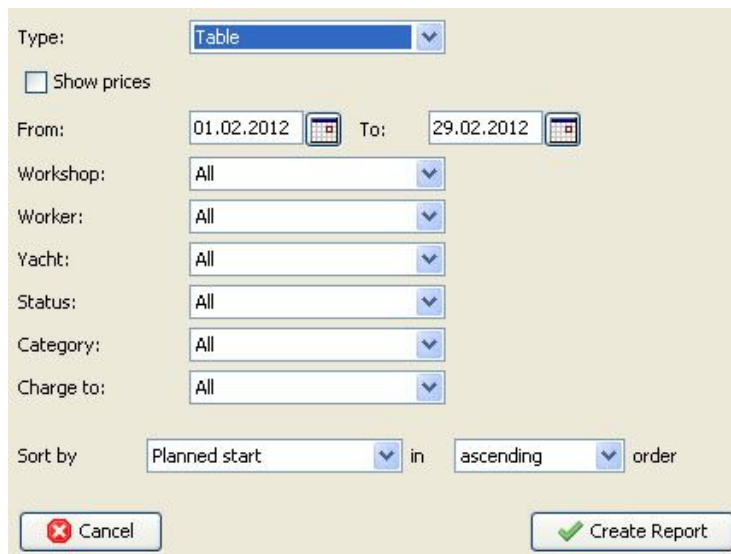
your report (Fig. 13).

Figure 13. Parameters for printing reports

In this window you can choose which type of report you want to produce and you can choose between table report or detailed report with all activities and articles. You can also choose if you want to show prices on the report. Then you can select some of the filters and those are filter by period, workshop, worker, yacht, task status, task category and to whom the costs are charged. The results can be sorted according to different parameters both in ascending and descending order.

Task details

Planned	Yacht	Workshop	Worker	Status	Category	Dur.	Description
02/08/2011	Boston Whaler 150 Montauk(Bo..	Split	Jethro Leroy	In progress	-	1.0	cleaning
11/08/2011	Antares 36 (2011)(Antares 36)	Split	Jethro Leroy	Completed	-	0.0	Demo description
27/08/2011	Lagoon 380 Premium(Lagoon 3..	Split	Jethro Leroy	Completed	Summer	2.3	cleaning yacht
						3.3	

Task costs

Planned	Yacht	Workshop	Worker	Status	Category	Dur.	Charge to	Price	End cost	Net price	End cost (VAT)
02/08/2011	Boston Whaler 150 Montauk(Bo..	Split	Jethro Leroy	In progress	-	1.0	Maintenance	89.10	98.02	88.20	97.04
11/08/2011	Antares 36 (2011)(Antares 36)	Split	Jethro Leroy	Completed	-	0.0	Own cost	0.00	0.00	0.00	0.00
27/08/2011	Lagoon 380 Premium(Lagoon 3..	Split	Jethro Leroy	Completed	Summer	2.3	Owner	10.14	11.16	10.03	11.06
						3.3		**99.24**	**109.18**	**98.22**	**108.10**

Figure 14. Reports with details of the task and cost

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Yacht:	Hera		
Worker:	tokić lana		
Status:	Completed		
Planned start:	20/12/2011	Start:	20/12/2011
Planned finish:	20/12/2011	Finish:	20/12/2011
Note			

Activities

Code Name	Amount	Price	Total	Warehouse	Note
0 provjera konopa	1.00	100.00 HRK	100.00 HRK	-	
0 promjena žarulje	1.00	10.00	10.00	-	

Articles

Code Name	Amount	Price	Total	Warehouse	Note
0 žarulja	2.00pcs	10.00 HRK	20.00 HRK	Warehouse Kastela	

Figure 15. Report about worker performance (activities and articles)

9. CBM module

Tasks management is also enabled through the Central Booking Manager (CBM) in almost identical way as in the Local Booking Manager.

9.1. Access Control

There are three access levels:

- Administrator

- Worker

- Yacht owner

Administrator

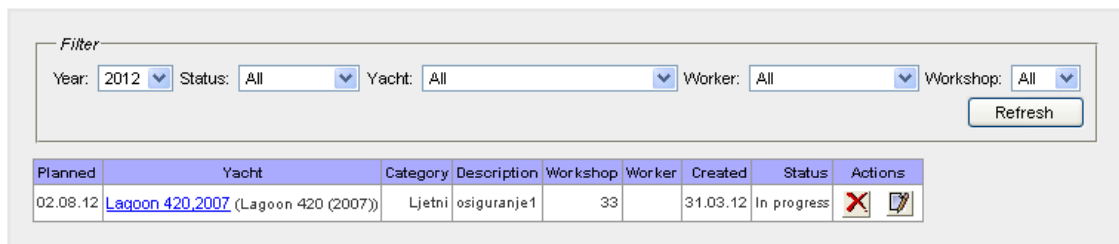Administrator sees all tasks and all the details of the tasks.

Worker

Workers have the option of viewing only their own tasks and edit only their own tasks. Also, workers have no insight into the cost of activities, items, or total cost of performing the task. Also, workers can not change the basic parameters of the task such as a workshop or yacht and can not change the activities and basic properties of tasks. The only thing workers can do is to further correct the articles that are used in terms of deleting articles, adding new ones, deducting and returning them to the warehouse.

Yacht owner

Owners have access to only those tasks that are carried over their own yacht and have no ability to change the parameters of the task. Owners will see the cost of the task only if it is chosen to charge cost to the owner.

9.2. Tasks list

Task list contains all the tasks that can be further filtered by the year in which it was intended to do, status, yacht, worker and workshop (Fig. 16).

The list provides direct initiating and completing tasks, and editing a particular task by selecting the appropriate buttons in the list next to each task.
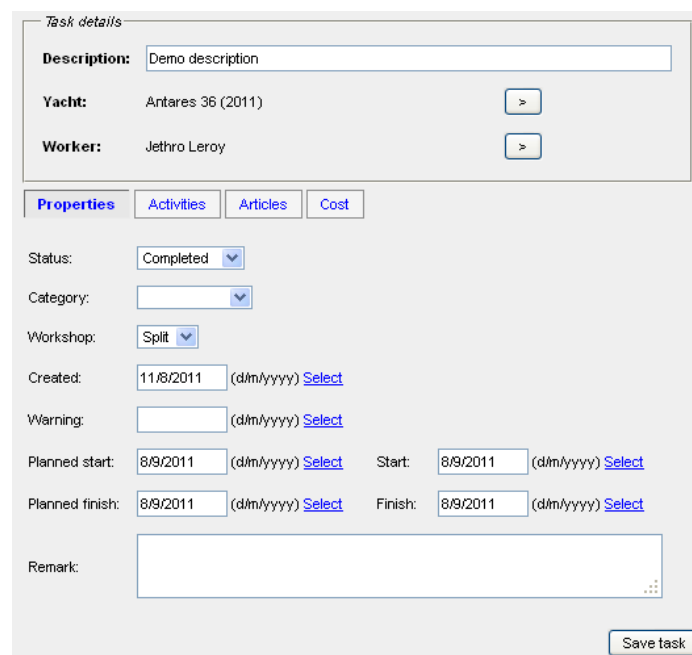
Figure 16. CBM tasks list

9.3. Task editor

Through CBM tasks can be edited in the same manner as is provided in LBM (Fig. 17), but it should take into account that different users have different editing capabilities as explained earlier.

Figure 17. CBM task editor