Warehouse and tasks

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.
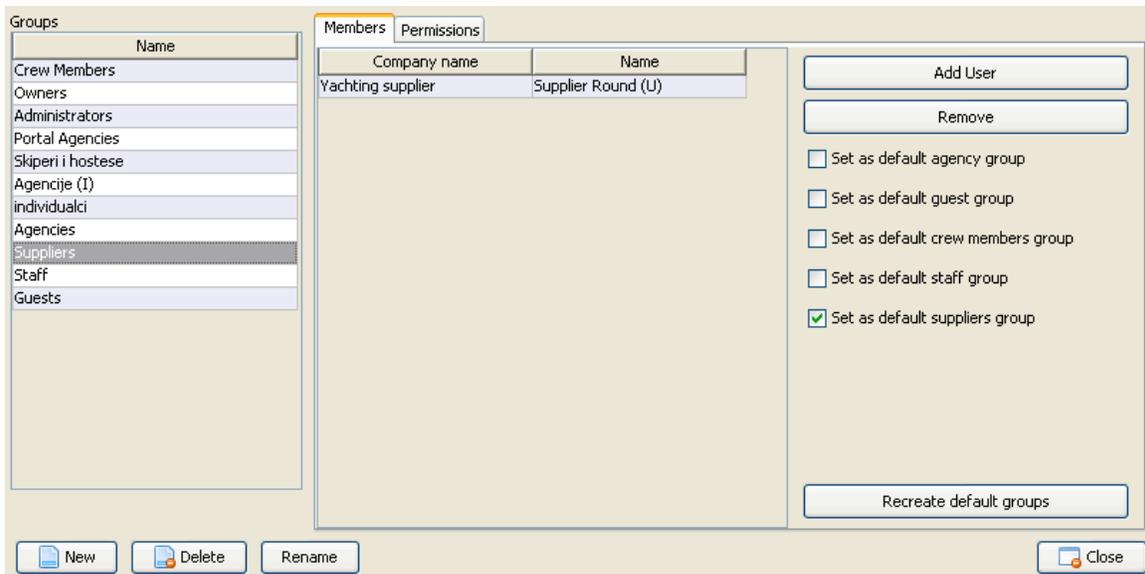
Figure 1. Default staff and suppliers group

2. Task category editor

Preferences → 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.
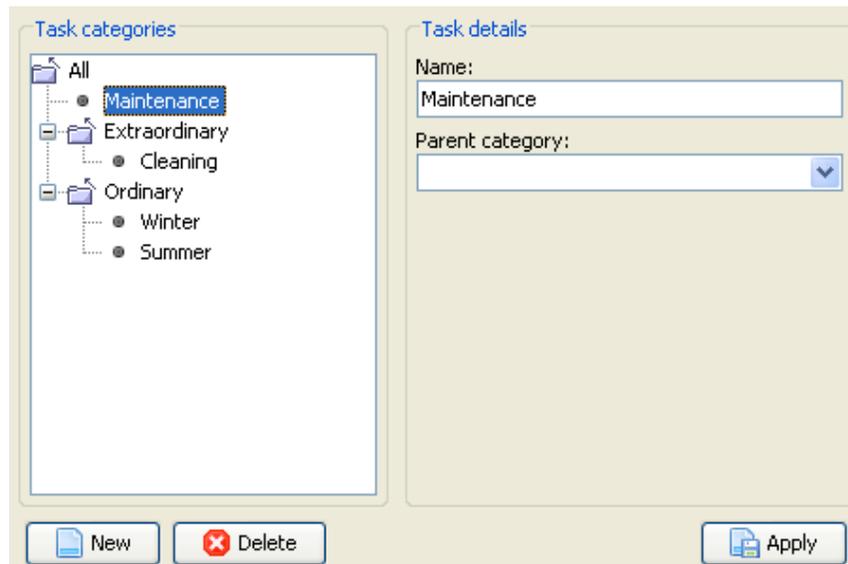

Figure 2. Task category editor

Each category can be assigned a name and parent category to which it belongs (Fig. 2). You should pay attention to the fact that each category can have only one parent and

category which is already a parent can not be a subcategory of any other category. Simply put, we can define a two-stage tree structure of categories. It is important to note that when choosing a category for the task you can not select parent categories but only categories that have no parents or categories which are subcategories.

3. Activities editor

Setup → 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 and an additional remark (Fig. 3).

Figure 3. Activities editor

4. Articles editor

Setup → Articles editor

In articles editor we define articles that will be added to certain warehouses. Articles are defined with their name, price 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

5. Workshops/Warehouses editor

Setup → 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).

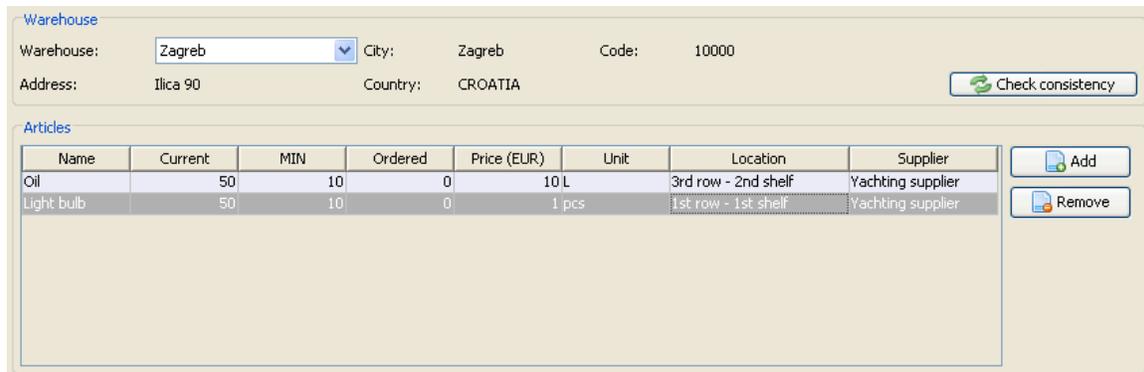Figure 5. Workshops/Warehouses editor

6. Warehouses

Work → 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.

7. Tasks Editor

Work → 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 and description (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:
- Workshop - workshops previously defined in the Workshops/Warehouses editor in which to perform the task
- Worker - a worker from default staff group who will perform the task
- Yacht – yacht on which task will be executed

- Status - the current status of the task which can be planned, in progress or completed
- Category - previously defined categories in the Task category editor. Only subcategories can be assigned to certain task
- Created - the date when the task is created

7.1. Properties

Figure 8. Task properties

- Description - The description of the task
- 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
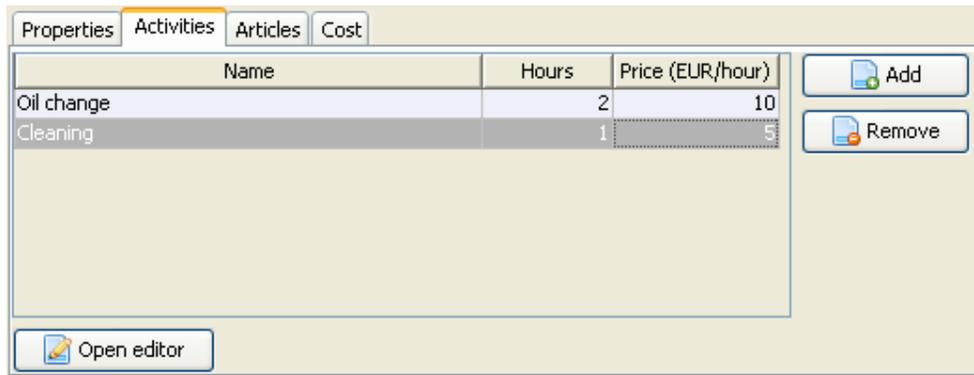
7.2. Activities

Figure 9. Task activities

This section defines the activities that need to be made so the task can be successfully finished (Fig. 9). Activities must first be defined in Activities editor, as previously described, in order to be able to assign them to the task. Regardless of how a certain activity is defined it can be further changed when it is applied to the task. In this way you can quickly and efficiently add activities whose price or work hours relatively frequently change without the need of constant changes in Activity editor or duplication of the same activity that has different parameters.
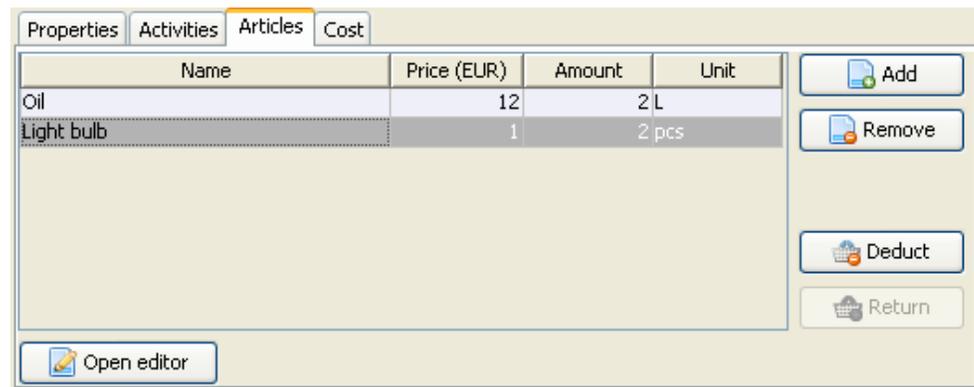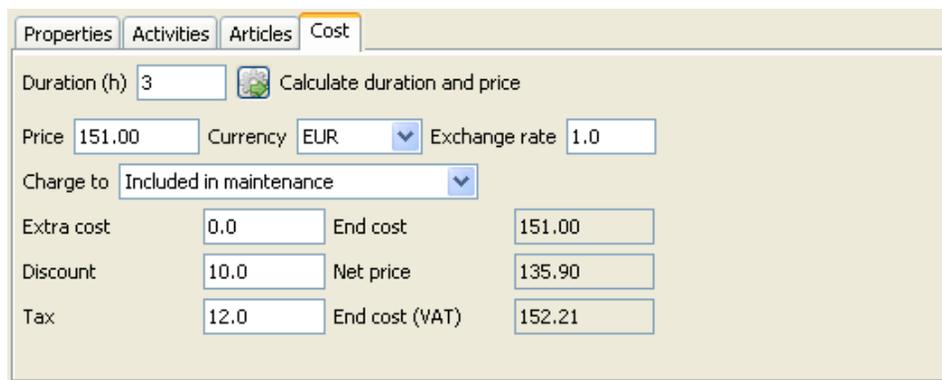
7.3. Articles

Figure 10. Task articles

Articles that will be used when performing the task are shown in "Articles" tab (Fig. 10). Individual article is added in such a 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.

7.4. Cost

Figure 11. Task cost

Task costs are shown on "Cost" tab and they can be automatically calculated by pressing the "Calculate duration and price" button (Fig. 11). 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

8. CBM module

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

8.1. 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.

8.2. 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. 12).

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 12. CBM tasks list

8.3. Task editor

Through CBM tasks can be edited in the same manner as is provided in LBM (Fig. 13), but it should take into account that different users have different editing capabilities as explained earlier.

Figure 13. CBM task editor