

How to Manage Projects with the Jobs Feature

Logistics providers, specifically third-party logistics providers (3PLs) and distributors who offer a variety of services, have many transactions to keep track of.

Let's say you are a 3PL and you have a customer in the hotel business who is renovating a hotel at a Hawaiian resort. They need many supplies purchased, stored, and shipped for this renovation project.

In the Magaya Supply Chain Solution, all these steps can be tracked in one place, the Jobs screen. At any point during the project, you can see exactly where you are and what percentage of all the steps

has been completed as the project approaches its deadline.

Linking Transactions and Tracking Job Progress

As you perform operations and create transactions in your Magaya system, you can link the transactions to a Job so you can see them all in one place. To link a transaction such as a Pickup Order or Warehouse Receipt to a Job, go to the transaction and click "Actions" to select "Add to Job" from the menu. For Purchase Orders and Sales Orders, open the transaction dialog box, and select the

Job number using the Job field and "Set" button on the General tab.

The commodities (items) in each transaction are also linked, and every time the items are involved in another transaction, the Jobs screen will be updated, helping you see the overall progress of the Job as it moves from 0% to 100% completed.

If all or most of the items in a Job have the status of "Ordered", the Job will have a low completion rate, perhaps less than 10%. When all the items have a status of "Delivered", the Job status will reach 100% completed.

The screenshot shows the Magaya Jobs interface. At the top, there's a toolbar with icons for navigation and actions. Below that, a "Job Status" section shows a progress bar at 66% and fields for Job Number (18), Customer (Jamaica Distribution Center), Creation Date (2/9/2011), and Due Date (3/15/2011). A "MAGAYA TIP" button is also present. Below the status section are tabs for General, Items, Purchase Orders, Sales Orders, Operations, Profit, Accounting, and Attachment. The "Profit" tab is active, displaying a table of transactions. A context menu is open over the table, showing options like "View charge...", "Regenerate charges", "Show in Documents", "Choose Columns...", "Move top", "Move up", "Move down", and "History...".

Status	Created in	Description	Apply to	Job Income	Job Expense
Open	Cargo Release <30>	New Balance 200 running shoes ...	Jamaican Destination Agent	0.00	1040.00
Posted	Sales Order <12>	New Balance 200 runn	Jamaica Distribution Center	1360.00	0.00
Posted	Sales Order <12>	Teva Beach Sandal	Jamaica Distribution Center	144.95	0.00
Open	Pickup Order <PU-33>	Documentation	Jamaica Distribution Center	19.15	0.00
Open	Pickup Order <PU-33>	Air Freight Service	Jamaica Distribution Center	194.25	0.00
Open	Pickup Order <PU-33>	Ground Freight Service	Jamaica Distribution Center	0.00	0.00
Open	Purchase Order <9>	Customs Broker Cost	Jamaican Destination Agent	0.00	12.77
Open	Purchase Order <9>	Air Freight Service Cost	Jamaican Destination Agent	0.00	160.77
Paid	Warehouse Receipt <WH-58>	Storage Cost	Jamaican Destination Agent	0.00	10.63
Paid	Warehouse Receipt <WH-58>	Storage Fee	Jamaican Destination Agent	15.00	0.00

Summary:

Expense	Income	Profit
USD 1224.17	USD 1733.35	USD 509.18

As each item inside a transaction is moved along in the process - from ordering, arrival at the warehouse, storage, and shipping - a status is assigned to the items:

- Ordered
- Arriving
- On Hand
- Loaded
- In Transit
- At Destination
- Delivered

For example, when you receive the PO from your customer who is renovating the hotel, you purchase the items they request. You enter the PO into your Magaya system, and link the PO to the Job. (Add the Job in the Job screen if you did not already.)

When you pick up the items from the manufacturer, the items have a status of "Arriving". When you enter them into your Magaya system by creating a WR, the status of the items is updated in the Jobs screen to "On Hand" automatically. When you ship them, they are "In Transit". When they reach the customer, they are "Delivered". When you liquidate the shipment at the end, all the accounting transactions will be updated in the Job automatically.

The Job will remain "Open" until you close it. The "End Date" is a deadline you set when you create the Job. As the status of the items is updated, you will see how close the Job is to being completed and meeting the due date. In one quick glance at the job percent, you can see if it



is where it needs to be so it can be done in time.

To view the expense, income, and profit for each Job, click the Profit button. The profit is calculated based on the items in that Job. To view details about any transaction listed, double-click it (or right-click on it and select from the pop-up menu).

The Job Income and Job Expense for each transaction is itemized, and the totals are displayed at the bottom of the screen. If you need to change a charge, double-click it to open it. If you need to add a new charge, go to the transaction. Changes are automatically updated in the original transaction and in the total for the Job. You do not have to manually update it. You can go a transaction by right-clicking on it.

Take advantage of the features in the Jobs screen to gain better control over the whole project and the big picture of your operations so you can make business-wide decisions that create tangible

results. Full details on Jobs are available in the *Magaya Supply Chain Solution Operations Manual* on the Training page of Magaya.com. ■