Monson Estimator System
- User Instruction Manual -
Last Revision: 28/08/13

Contents

Introduction
Welcome to the Monson Estimates System. This manual is intended for users of the system, and will cover all the features the latest version of the system will contain. This document was written to help users understand how to use the functions the system in a simple, easy-to-read method.

Requirements
The Estimates System is not very demanding. The service simply requires an internet connection and a modern internet browser. This means Mozilla Firefox (v. 4+), Apple Safari (v. 5+), Google Chrome (v. 4+), or Internet Explorer (v. 10+). Make sure your browser has Javascript running on it (most modern browsers do) and that cookies are enabled.

If you're stuck with a computer that doesn't have any of those browsers, however, you can still attempt to use the system – while the performance of the system isn't guaranteed, simple operations such as viewing published disbursements should be supported. Of course, the safest way to use the system would be to update to the latest version of your browser.

Should any problems appear or persist, feel free to contact http://stage3systems.com/support to submit a support ticket, and we'll get back to you as soon as possible.

Login Page

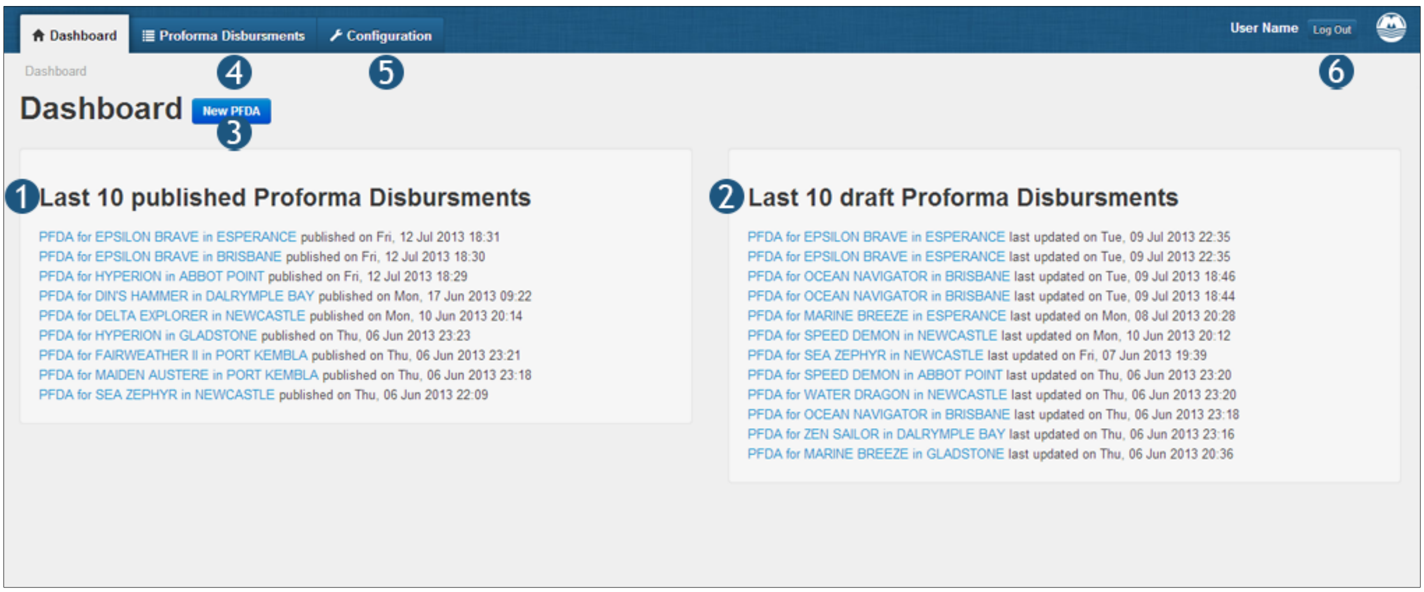
The first time you try to enter the site you will be directed to the Proforma DA system's login page. From here, you will need to enter a valid username and password to continue to the rest of the system.

If you are having trouble logging in, click on the “Trouble logging in?” link at the center of the page, and you will be redirected to user support.

Dashboard

Upon a successful login, you will be directed to the dashboard, which functions as the central hub of the system.

In the dashboard, you can see which disbursements were recently drafted, updated, and published, as well as access the Disbursements page, the Configuration page, and Log Out.

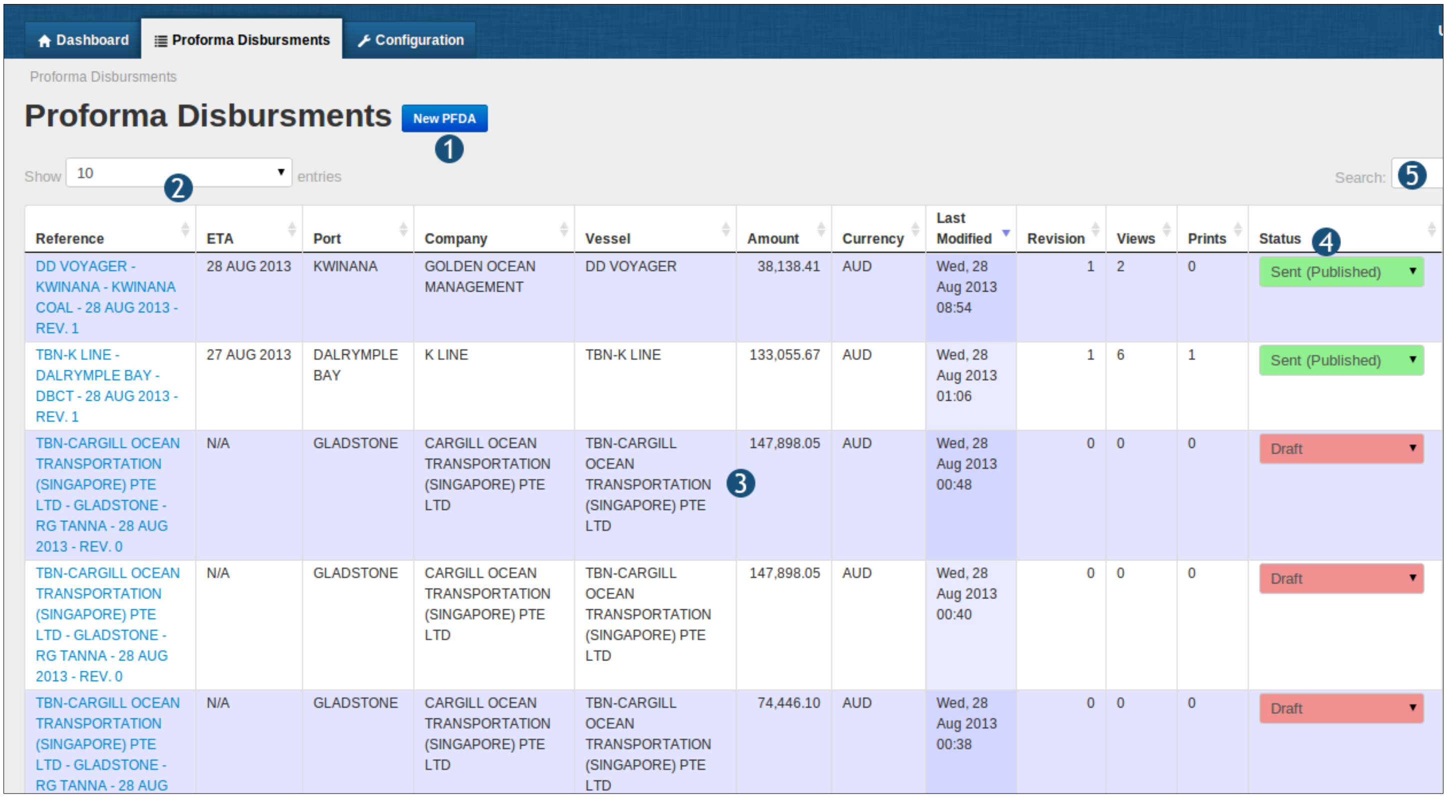


1. This panel lists the ten most recently published and sent disbursements.
2. This panel lists the ten most recently drafted disbursements.
3. This button lets you quickly draft a new PFDA.
4. This tab leads to the Disbursements page, where you can draft and publish disbursements.
5. This tab leads to the Configuration page, where you can create and modify vessels and companies.
6. This button will log you out. Don't forget to click it when you're done with the system!

You can click on a disbursement to quickly jump to it. If it’s a published disbursement, you’ll be directed to its Published View, and if it’s still a draft, you’ll be sent to the Editing PFDA page for that disbursement.

Proforma Disbursements

The Proforma Disbursements tab is where you can view, draft, and publish disbursements. Viewing and sorting disbursements is very simple - with a single click, you can sort the displayed disbursements by different parameters. And when the time comes where you've written many disbursements, you can use the manual search function to filter the displayed results in real-time.



Reference	ETA	Port	Company	Vessel	Amount	Currency	Last Modified	Revision	Views	Prints	Status
DD VOYAGER - KWINANA - KWINANA COAL - 28 AUG 2013 - REV. 1	28 AUG 2013	KWINANA	GOLDEN OCEAN MANAGEMENT	DD VOYAGER	38,138.41	AUD	Wed, 28 Aug 2013 08:54	1	2	0	Sent (Published)
TBN-K LINE - DALRYMPLE BAY - DBCT - 28 AUG 2013 - REV. 1	27 AUG 2013	DALRYMPLE BAY	K LINE	TBN-K LINE	133,055.67	AUD	Wed, 28 Aug 2013 01:06	1	6	1	Sent (Published)
TBN-CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD - GLADSTONE - RG TANNA - 28 AUG 2013 - REV. 0	N/A	GLADSTONE	CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD	TBN-CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD	147,898.05	AUD	Wed, 28 Aug 2013 00:48	0	0	0	Draft
TBN-CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD - GLADSTONE - RG TANNA - 28 AUG 2013 - REV. 0	N/A	GLADSTONE	CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD	TBN-CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD	147,898.05	AUD	Wed, 28 Aug 2013 00:40	0	0	0	Draft
TBN-CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD - GLADSTONE - RG TANNA - 28 AUG	N/A	GLADSTONE	CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD	TBN-CARGILL OCEAN TRANSPORTATION (SINGAPORE) PTE LTD	74,446.10	AUD	Wed, 28 Aug 2013 00:38	0	0	0	Draft

1. This button will lead you to a page for PFDA creation. More on that in the next section.
2. This selector will let you choose the number of PFDAs displayed per page from 10/25/50/100.
3. This table is where all the disbursements are displayed. You can change the sort order by clicking on one of the headings – by default, it sorts by the date it was last modified.
4. This is where you can change the status of a disbursement from Draft to Sent (Published). To find out more about the difference, read **Published PFDAs**.
5. This is where you can enter filtering keywords. Learn more in **Sorting/Filtering Disbursements.**

Creating New PFDAs

Proforma Disbursements can be created in a simple, two-step process. The first step requires your input of the disbursement's basic information - the Port, Terminal, Principal, and Vessel.

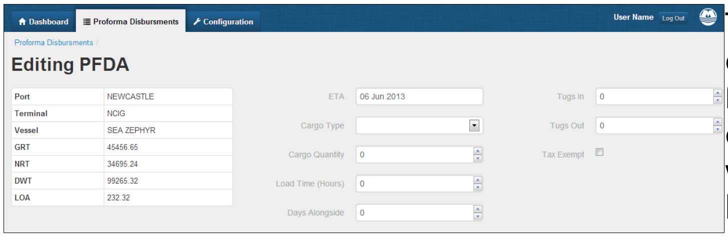
- If you wish to enter a vessel that isn't predefined, check off "TBN", and the page will display four input boxes where you can enter the undefined vessel's parameters as well as a dropdown where you can choose from class templates such as PANAMAX and CAPESIZE.

Once you're done, click Next. You will be brought to a more detailed screen where you can view and edit the services and fees.

Editing PFDAs

Upon the initial creation of a PFDA you will be brought to the PFDA editing screen, where you can view and edit the more detailed aspects of a disbursement.

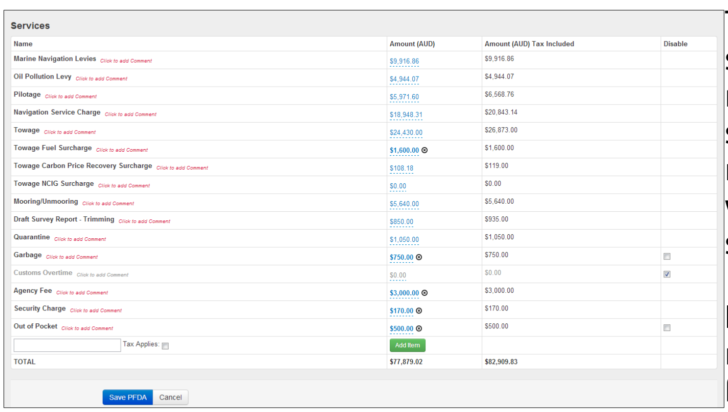
The upper half of the editing page is where the disbursement's basic properties and parameters are displayed.



To the left you can view the disbursement's creation parameters – these cannot be changed from this page. If there's something you want to change for the disbursement - for example, the vessel the disbursement is meant for - you would have to create a new PFDA.

To the right are the other relevant parameters for the disbursement - these can be edited freely.

- Click on the ETA input box to display a calendar - from there, you can select the vessel's ETA
- Cargo Type, Cargo Quantity, Load Time, and Days Alongside can be specified in their own input boxes. While not required for the PFDA's creation, these usually affect the estimation.
- Tugs In and Out represent the number of tugs used for the vessel's towage. These values default at 0 (which in real life never happens!) so make sure you input the values.



Services

Name	Amount (AUD)	Amount (AUD) Tax Included	Disable
Marine Navigation Levies *Click to add Comment*	$9,916.86	$9,916.86	
Oil Pollution Levy *Click to add Comment*	$4,944.07	$4,944.07	
Pilotage *Click to add Comment*	$5,971.60	$6,568.76	
Navigation Service Charge *Click to add Comment*	$18,948.31	$20,843.14	
Towage *Click to add Comment*	$24,430.00	$26,873.00	
Towage Fuel Surcharge *Click to add Comment*	$1,600.00	$1,600.00	
Towage Carbon Price Recovery Surcharge *Click to add Comment*	$108.18	$119.00	
Towage NCIG Surcharge *Click to add Comment*	$0.00	$0.00	
Mooring/Unmooring *Click to add Comment*	$5,640.00	$5,640.00	
Draft Survey Report - Trimming *Click to add Comment*	$850.00	$935.00	
Quarantine *Click to add Comment*	$1,050.00	$1,050.00	
Garbage *Click to add Comment*	$750.00	$750.00	☐
Customs Overtime *Click to add Comment*	$0.00	$0.00	☑
Agency Fee *Click to add Comment*	$3,000.00	$3,000.00	
Security Charge *Click to add Comment*	$170.00	$170.00	
Out of Pocket *Click to add Comment*	$500.00	$500.00	☐
Tax Applies: ☐	Add Item		
TOTAL	$77,879.02	$82,909.83	

Save PFDA Cancel

The lower half of the editing page is where the services associated with the port are listed. The majority of them are automatically filled in by the system based on historical data, with the rest requiring manual entry. This is also where you would manually add, remove, and edit the services included in the disbursement.

If a service says $0.00, there are two common reasons: either one of the fields in the top wasn't filled, or it needs to be manually entered.

- Services can be disabled by selecting the check box to the far right - disabling a service means it won't be displayed on the final, published disbursement. Note: a service that charges $0.00 will still be displayed if it's not disabled!
- While the system automatically fills in the expected service fee, sometimes the value can be off - perhaps the tariff has updated, or the system miscalculated. Let us know so we can update it, but in the meantime, you can always manually enter a different value by clicking it.
- If a service that should be present isn't, you can create your own. At the bottom is a textbox where you can manually type in a service name. Check off if tax applies, and click “add item”. From there, you can you manually change the amount.
- If a custom service or amount needs to be changed, simply click the "x" next to it, and it will either revert to the default (if it's an amount) or be deleted (if it's a service).

Sorting & Filtering PFDAs

Sorting the columns in the Proforma Disbursements view is quite intuitive - like many similar systems, clicking on a column header will cause the table's sorting to be based on the selected category. For example, clicking on "Port" will sort all the disbursements according to their Port. This kind of sorting interaction is applicable to all other data tables too - we can do the same with Vessels and their parameters under Configuration.

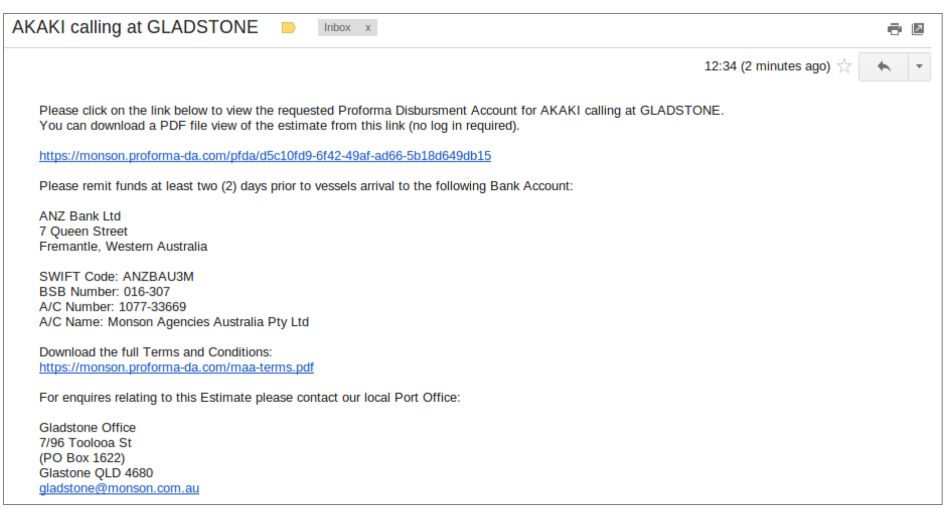
Filtering disbursements is less simple, but very powerful. By entering keywords into the search box, you can filter out disbursements that aren't relevant to the keywords. Nearly any quality of a disbursement can be used as a filter - for example, if you only want to view disbursements coming out of Newcastle, simply type "Newcastle" in the search box and the data table should filter out all irrelevant disbursements in real-time. No need to wait for the page to reload!

Of course, there are other qualities that can be filtered out too - ship names, terminal names, dates; You can even select multiple keywords. Going back to our Newcastle filter, let's say only wanted disbursements created in April 2013. We'd keep "Newcastle" in the search box, and add "APR 2013" to return only disbursements made in that month. There's no limit to how many keywords you can enter, but keep in mind that the more you add, the more specific your results will get!

Published PFDAs

While a disbursement shows all of its information when you create it, it's still in a draft form – to publish it, you need to change the disbursement's status from *Draft* to *Sent*. To do so, click the red dropdown from the list view and change it to "*Sent (Published)*". Now you can view and share it with non-users, in a nicely formatted and printable page.

To share the published PFDA with others, you have two options: you can either directly share the hyperlink of the Published PFDA, or you can click the "Email" button in the list view (the envelope button, right next to the edit button). Clicking the button will open up your email client (e.g. Outlook) and compose an email for you that has a link to the PFDA in question, as well as the disclaimers. When the recipient opens the email, it should look somewhat like this:


AKAKI calling at GLADSTONE Inbox x

12:34 (2 minutes ago)

Please click on the link below to view the requested Proforma Disbursment Account for AKAKI calling at GLADSTONE.
You can download a PDF file view of the estimate from this link (no log in required).

https://monson.proforma-da.com/pfda/d5c10fd9-6f42-49af-ad66-5b18d649db15

Please remit funds at least two (2) days prior to vessels arrival to the following Bank Account:

ANZ Bank Ltd
7 Queen Street
Fremantle, Western Australia

SWIFT Code: ANZBAU3M
BSB Number: 016-307
A/C Number: 1077-33669
A/C Name: Monson Agencies Australia Pty Ltd

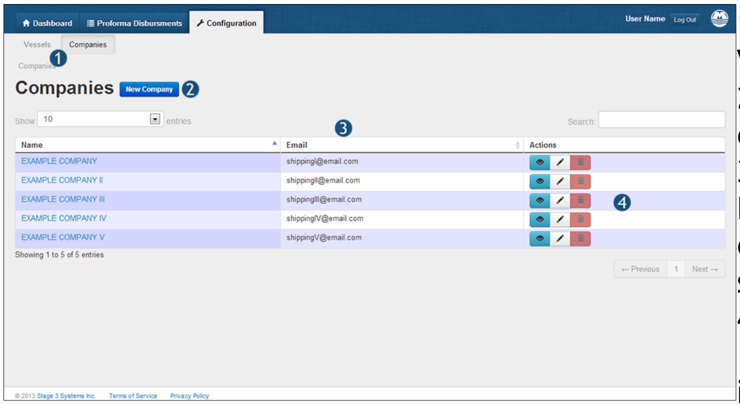
Download the full Terms and Conditions:
https://monson.proforma-da.com/maa-terms.pdf

For enquires relating to this Estimate please contact our local Port Office:

Gladstone Office
7/96 Toolooa St
(PO Box 1622)
Glastone QLD 4680
gladstone@monson.com.au

Configuration

The configuration screen is where all the "behind-the-scenes" information is added. Here, you can add/view/edit both Vessels and Companies.



1. These tab selectors let you switch between Vessel editing and Company editing.
2. This button will lead you to a page where you can create a new Company.
3. This is where all the Companies are displayed. Functionally, it works very similarly to the disbursements listing, including the filtering and sorting actions.
4. These buttons let you view, edit, and delete Companies. The delete button can't be selected if there exists a disbursement associated with it.

The Vessels page is functionally identical and looks extremely similar to the Companies page - all the concepts that apply to the Companies page apply to the Vessels page.

Creating/Editing a New Vessel

Vessel creation is incredibly straightforward. Simply enter the desired values for the Vessel's parameters and the system will instantly generate a Vessel with those dimensions.

Vessel editing looks exactly the same as Vessel creation - this means all the properties of a Vessel can be changed, so you don't need to worry about getting it right the first time.

Changing a vessel's dimensions also retroactively affects disbursements associated with it - for example, if a service took DWT into account and you changed it after drafting the disbursement, it will automatically update the amount so that it represents the most recent vessel revision.

Deleting a vessel while a disbursement is associated with it is not possible, however - this way, users can't accidentally delete important disbursements if they click the wrong buttons.

Creating/Editing a new Company

Company creation is even more straightforward than Vessel creation - in this version of the system, Companies only store two pieces of information: Name, and Email. Simply fill them in, and a Company can be created instantaneously. Like Vessels, Companies can be fully edited at any time, but you can't delete them if they have an associated disbursement.

Further Notes

While we try to be as thorough and clear as possible, sometimes some things just aren't clear enough. Contact us at http://stage3systems.com/support, and we'll do our best to clarify.