

Job Manager Core - Installation Guide



Job Manager Core - Installation Guide

For: Microsoft Dynamics 365 Business Central
(Essentials or Premium)

Granule ID: 14,190,800

The screenshot displays the Job Manager Core interface within Microsoft Dynamics NAV. The dashboard includes a 'Jobs' section with metrics for Planning Jobs (3), Quote Jobs (0), Open Jobs (20), and Completed Jobs (2). It also features 'Sales' and 'Purchases' sections with their respective metrics. A 'My Customers' table is visible on the right, listing customer details and balances. The interface includes a navigation pane on the left and a top menu bar with 'ACTIONS' and 'REPORT' options.

Customer No.	Name	Phone No.	Balance (\$)
0144...	Progressive Home Furnishings		2,461.00
10000	The Cannon Group PLC		268,326.75
20000	Selangorian Ltd.		147,258.97
30000	John Haddock Insurance Co.		537,967.00
3265...	Antarcticopy		3,980.85

Item No.	Description	Unit Price
1000	Bicycle	4,000.00
1001	Touring Bicycle	4,000.00
1100	Front Wheel	1,000.00
1150	Front Hub	500.00
1200	Back Wheel	1,200.00

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Developers Guide

Hardware Requirements:

The hardware requirements for Job Manager Core are the same as the minimum requirements for Microsoft Dynamics 365 Business Central.

Software Requirement:

A prerequisite for using Job Manager Core is that you must also be licensed for Microsoft Dynamics 365 Business Central.

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Installation Instructions:

How to Install an App from Microsoft AppSource

Note: This applies to ALL Apps from AppSource.

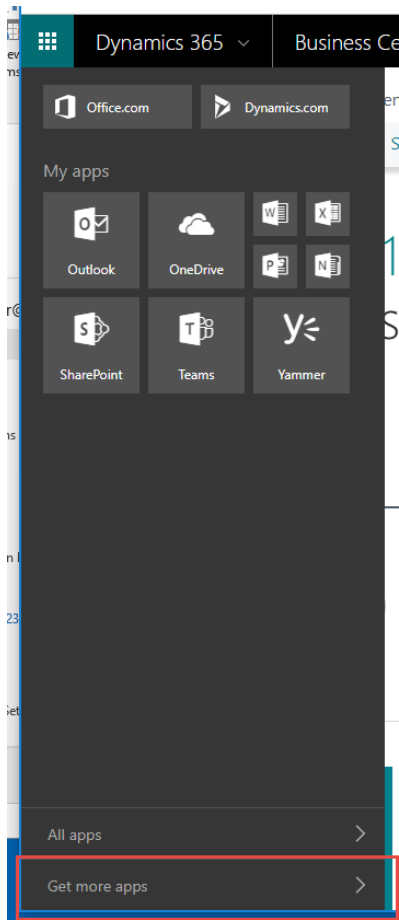
1. Login to your Business Central with your Microsoft Account.



2. Install a new App from within your Business Central Role Center.

Select "Dynamics 365" Apps, "Get More Apps"

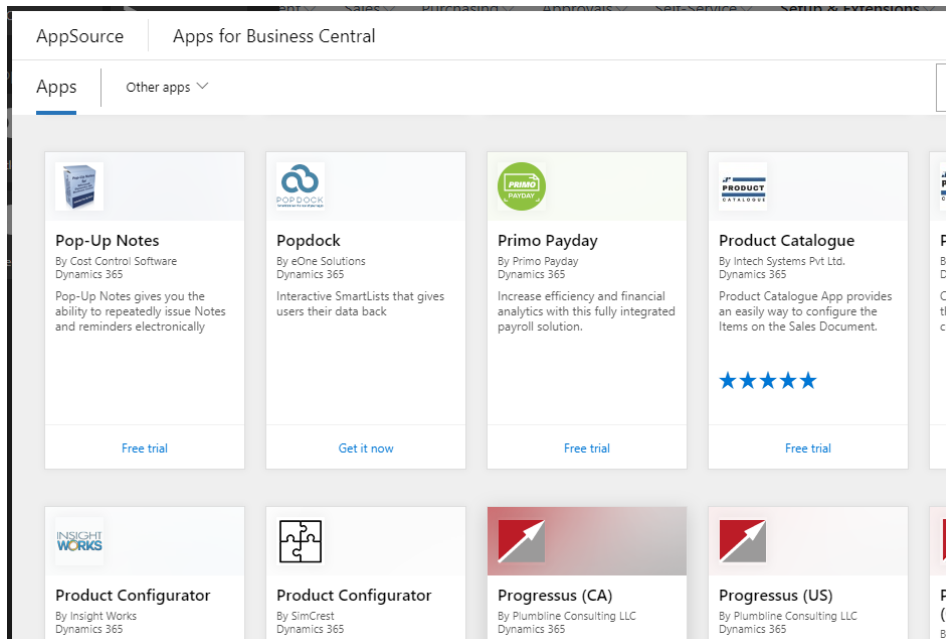
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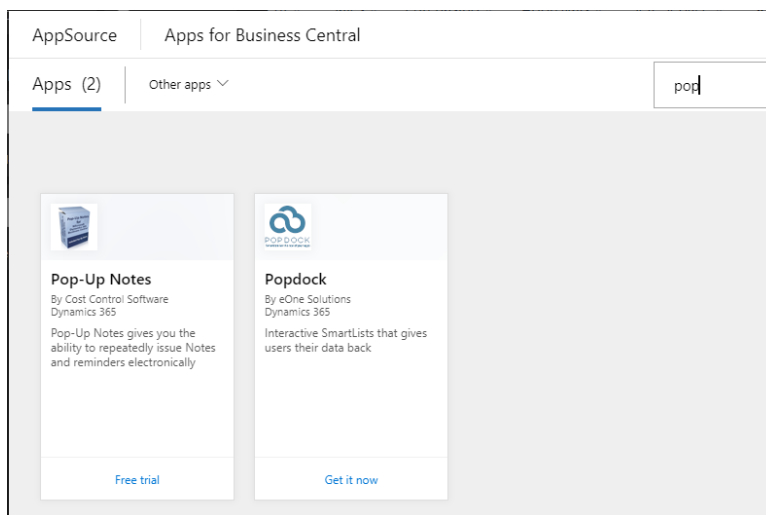
3. A new screen will appear that shows all the Apps that are currently available on AppSource.

As of this writing there are over 200 Apps available including several from your friends here at Cost Control Software.

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4. You can search by Name too.
Use the Search Box and type in “Manufacturing Plus” or “Job Manager Core” (“Pop-Up Notes” shown below)
You will see a list like this:



5. Select Manufacturing Plus (“Pop-Up Notes” shown) to Install and start your FREE Trial.
Click on your App to open the Information Details page.

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Microsoft | AppSource Apps

Apps > Pop-Up Notes

Pop-Up Notes

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FREE TRIAL

[SAVE FOR LATER](#)

Products
Dynamics 365 Business Central

Publisher
Cost Control Software

Acquire Using
Work or school account

Version
1.0.0.1

Updated
11/20/2018

Categories
[Customer service](#)
[Marketing](#)
[Operations + supply chain](#)

Industries
[Manufacturing](#)
[Professional services](#)

Products supported
Microsoft Dynamics 365 Busi...

Pop-Up Notes gives you the ability to repeatedly issue Notes and reminders electronically

Up-Sell Every Day

Customer Service Representatives (CSR) might be missing selling opportunities. Selling batteries with your radio, water bottles with your bicycles, or golf balls with that new Driver. Pop-up notes pops up an alert/reminder for the CSR to "ask" for more business. Watch your sales grow as your team remembers to ask for more business.

Benefits

- Automatic Pop-Up during Data Entry
- Keep staff informed
- Remember important details about a Customer, Vendor, Item or Service Item
- Managers can create Pop-up Notes in one place and all staff will automatically get the messages
- Reminders of Vendor Promotions
- Reminders of Vendor's promises on Shipping or Terms
- Reminders on Customer requirements and/or expectations
- Reminders on promises made to Customers
- Pop-Up Notes can serve as Alerts too
- Put your Customer Comments in visual Pop-ups

6. Select "Get It Now" or "Free Trial" to start the Install process.

Apps > Pop-Up Notes

Pop-Up Notes

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FREE TRIAL

[SAVE FOR LATER](#)

Pop-Up Notes gives you the ability to repeatedly issue Notes and reminders electronically

Up-Sell Every Day

Customer Service Representatives (CSR)

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7. Fill in all the required information and say “YES” to the Terms of Service.

One more thing ...

Pop-Up Notes
By Cost Control Software

This app requires some basic profile information. We have pulled your Microsoft Account data to help you get started. AppSource will save your information for next time.

Name * Rick Baxter

Work email * rick.baxter@costcontrolsoftware.com

Job title

Company Cost Control Software

Country / region Indiana, USA

Phone number * 317-846-6025

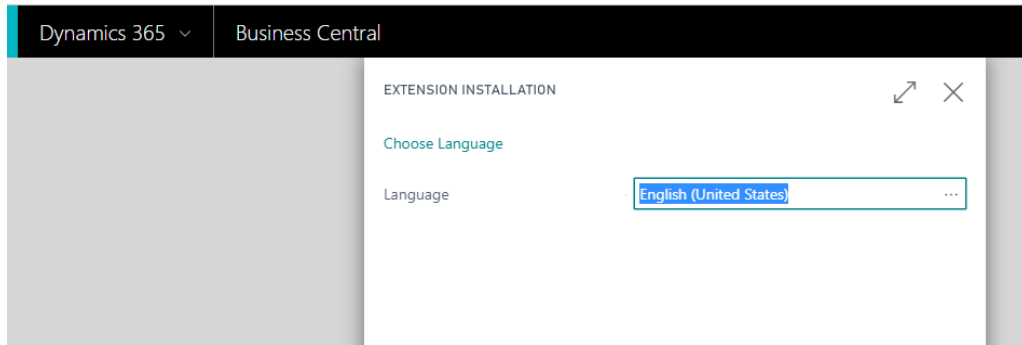
I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as Rick Baxter (rick.baxter@costcontrolsoftware.com).

Continue

8. Click on “Continue”
9. Set your desired Language:

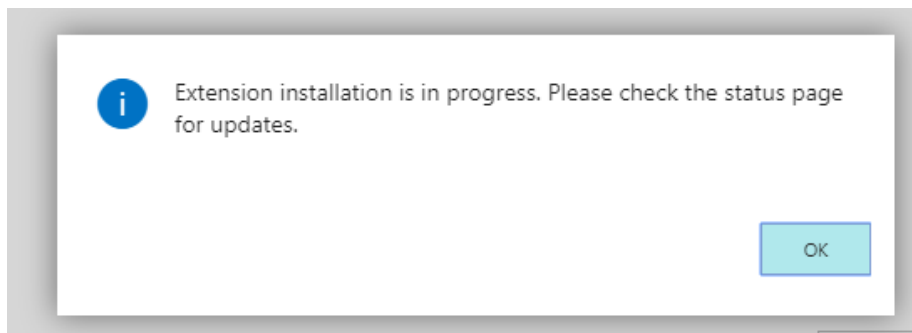
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10. Click on "Install".

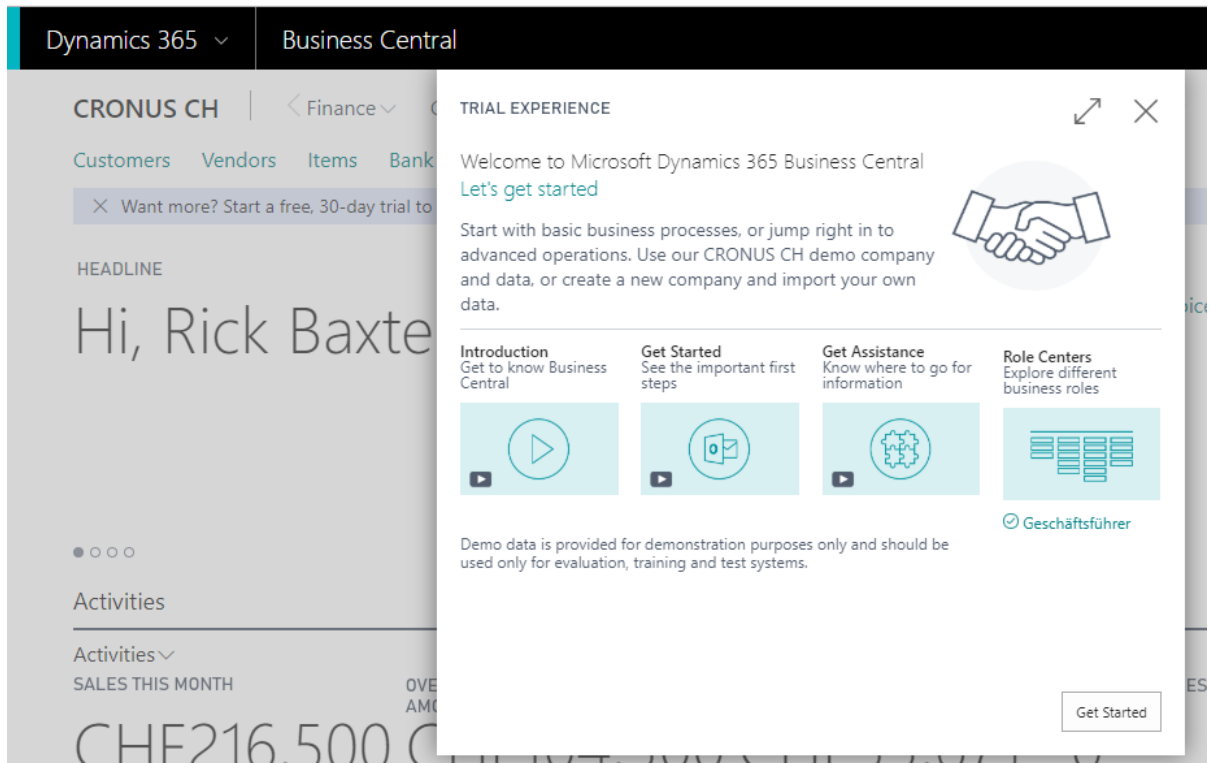


11. A message will appear saying that the installation is in progress. Please check the Status Page for updates.



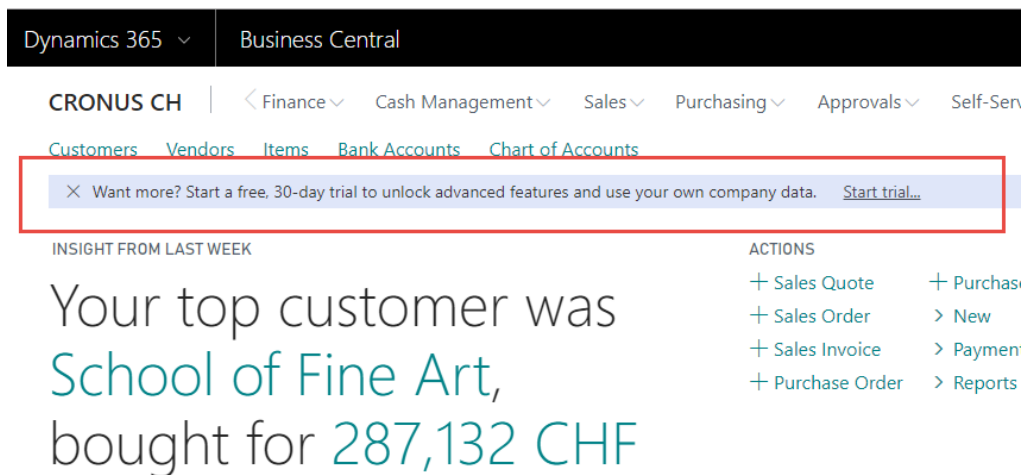
12. Note: If you don't have your own copy of Business Central, a Trial Account will be setup for you automatically.

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There are training videos you can watch.
There are many "Role Centers" provided. (Try them out)

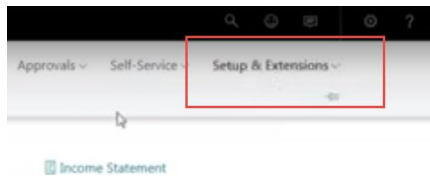
Select "Get Started" to start your 30-day trial.



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13. Navigate to the Status Page to verify the installation.

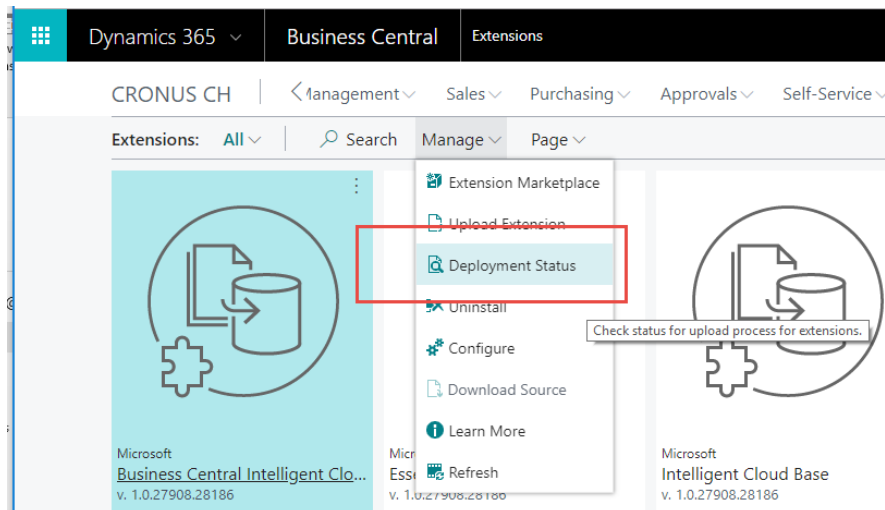
Select "Setup & Extensions"



14. Select "Extensions"

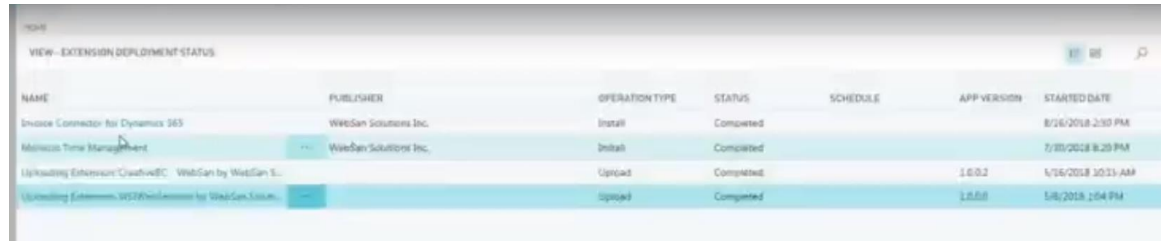


15. Select "Manage" Tab, and then "Deployment Status"



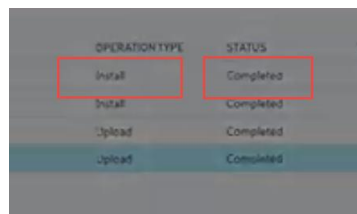
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16. View the Deployment Status Page:



NAME	PUBLISHER	OPERATION TYPE	STATUS	SCHEDULE	APP VERSION	STARTED DATE
Invoice Connector for Dynamics 365	WebSan Solutions Inc.	Install	Completed			8/16/2018 2:50 PM
Microsoft Time Management	WebSan Solutions Inc.	Install	Completed			7/20/2018 9:29 PM
Uploading Extension CreativeBC WebSan by WebSan S...	WebSan by WebSan S...	Upload	Completed		1.0.0.2	1/15/2018 10:11 AM
Uploading Extension W2200Access by WebSan Solutions...	WebSan Solutions...	Upload	Completed		1.0.0.0	1/8/2018 1:04 PM

17. Look for “Manufacturing Plus” and you should see that “Install” is now “Complete”.



OPERATION TYPE	STATUS
Install	Completed
Install	Completed
Upload	Completed
Upload	Completed

18. Your Application is now installed and ready for the “Setup” process.

- Follow the instructions in the “Setup” manual.
- You must ALWAYS perform the setup before you can start using the Application.

19. Once “Setup” is complete, you are ready to use your new App.

- Follow the “Workflow Guide” for step by step instructions on how to use your new application.

20. Most Apps start with a 30 Day trial period at no charge. If you want to go ahead and start using the app, select the “Buy Now” option at the top of the screen.

- Enter your Contact Information and Credit Card for your first monthly billing.

21. All the best.

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Application Tips:

Go to Settings.

Select the right **ROLE CENTER** for your use of the application. (Job Manager Core)

The screenshot displays the Dynamics 365 Business Central interface for CRONUS International Ltd. The top navigation bar includes 'Inventory', 'Product Design', 'Capacities', 'Journals', and 'Posted Documents'. Below this, there are links for 'Customers', 'Vendors', 'Items', 'Resources', 'Work Centers', 'Machine Centers', and 'Locations'. The 'ACTIONS' section shows a breadcrumb trail: 'Tasks > General > Tracking', with sub-actions for 'Planning Availability' and 'Subcontractor - Dispatch List'. The 'Insights' section is titled 'MFG Plus Activities' and contains several data cards:

- PRODUCTION:** SIMULATED (1), PLANNED (0), FIRM PLANNED (2), RELEASED (6)
- SALES:** SALES QUOTES (0), SALES ORDERS (42), SALES INVOICES (1), SALES CR. MEMOS (1)
- PURCHASES:** PURCHASE QUOTES (0), PURCHASE ORDERS (21), PURCHASE INVOICES (0), PURCHASE CR. MEMOS (0)

On the right side, there are two tables:

My Production Orders

STATUS	PRODUCTION ORDER No.	DESCRIPTION
Released	1011002	Bicycle
Released	1011004	Bicycle

My Items

ITEM NO.	DESCRIPTION	UNIT PRICE
1000	Bicycle	4,000.00
1001	Touring Bicycle	4,000.00
1100	Front Wheel	1,000.00
1150	Front Hub	500.00
1200	Back Wheel	1,200.00

At the bottom right, there is a section for 'My Customers'.

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Support

Congratulations on your purchase of Job Manager Core! We couldn't be more thrilled for you. Soon you will be on your way to enjoying and utilizing the features and functionality of this product.

Most importantly, Cost Control Software sincerely appreciates your trust in our products.

Should you have any questions, comments or training requirements we encourage you to contact us immediately. Also, if you are considering modifications or seeking new software functionality, please contact us.

Cost Control Software provides many add-on products that may be just the solution you were looking for. We would be glad to provide you with a full Catalog of our products. You may also check out our website to see available add-on products as well.

Visit: www.costcontrolsoftware.com for more information.

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