



## **Job Manager Core: Enhancement Guide**

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Enhancement Guide for the Job Manager Core module for  
Microsoft Dynamics 365 Business Central.

### **Cost Control Software**

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**General**

The following section shows general information about the Job Manager Core add-on, along with the document revision and related documents.

**Product Details**

Granule	14190800
Supported Versions	Microsoft Dynamics 365 Business Central
Supported Languages	English (ENU)

**Document Version**

Name	Date	Version	Description
Carolyn Hannon	04/08/2020	1.00	Document created

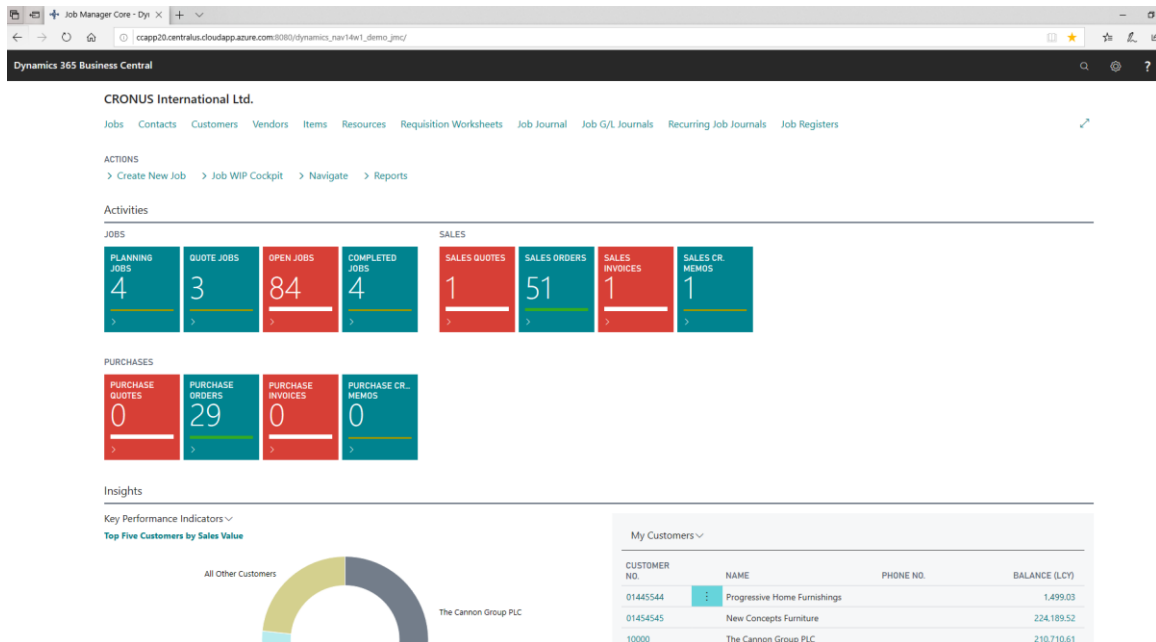
**Application Description**

The add-on Job Manager Core was developed to enhance the Microsoft Dynamics 365 Business Central Job Granule.

The module adds fundamental usability improvements to the Business Central Job Granule, making it easier to manage resources, track job status, record consumption of items, schedule job tasks, view costs and material requirements and manage subcontractor activities, all within a single integrated software solution.

## Key Enhancements

1. Job Manager Core Role Center – we start with a well laid out Role Center for your Job Oriented Users. This is your “Main Menu”. You have quick access to everything you need to manage your Jobs.



Start your learning at the Role Center. Click on the Tiles to drill down into the Jobs, Sales Order, and Purchase Orders.

Click on the Top Ribbon Menu to access: Jobs, Contacts, Customers, Vendors, Resources, or Items, as well as the primary worksheets, Job Journals and Requisition Worksheet.

2. The Job List is enhanced with Master Jobs and Sub Jobs.  
 Job Manager Core turns your Jobs into Projects with Job Groups. The bold lines represent the Master Job. (Project). The Sub Job(s) holds all the Revenue and Cost Postings. The Master Job rolls up of the sub job's

data.

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Jobs Contacts Customers Vendors Items Resources Requisition Worksheets Job Journal Job G/L Journals Recurring Job Journals Job Registers

Jobs: Custom filtered Search + New Delete Process Report Navigate Job Show Attached Open in Excel Actions Navigate

No.	IS MA... JOB	DESCRIPTION	DESCRIPTION 2	TEMPLATE SOURCE	SOURCE NO.	BILL-TO CUSTOMER NO.	BILL-TO
1000		Template for Master Jobs		Project		CRONUS USA	CRONUS
DEERFIELD...	<input type="checkbox"/>	Setting up Eight Work Areas		Project	40000	Deerfield	
GUILDFOR...	<input type="checkbox"/>	Setting up Ten Conference Roo...		Project	50000	Guildford	

**Job Details - WIP/Recognition**

Job No.	1000
WIP Posting Date	
Total WIP Cost Amount	0.00
Total WIP Sales Amount	0.00
Recog. Costs Amount	0.00
Recog. Sales Amount	0.00
Recog. Profit Amount	0.00
Recog. Profit %	0.00

**Job Summar Stats Factbox**

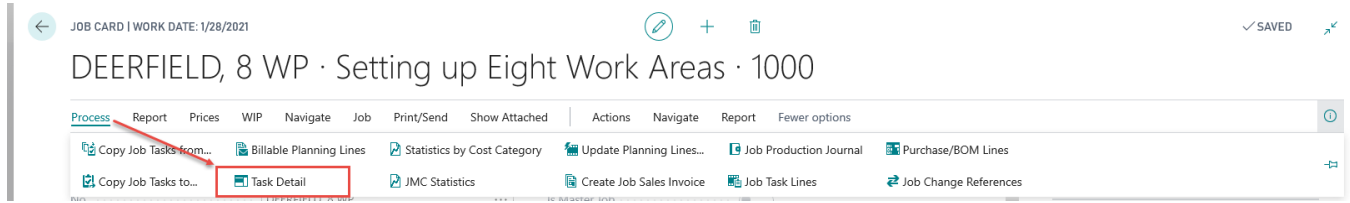
Job No.	1000
<b>BUDGET</b>	
Planned Billable	146,710.91
Planned Cost	32,443.80
Planned Profit	<b>114,267.11</b>
<b>ACTUAL</b>	
Invoiced	0.00
Posted Cost	20,888.42
Profit To Date	<b>-20,888.42</b>
<b>% COMPLETE</b>	
% Invoiced	0.00
% Cost	64.38
Cost Based Earned Billable	94,458.00
Planned Billable	146,710.91

This enhanced design ensures your Job Users have instant access to the Job Cost within their Project. (Master Job with multiple Sub Jobs). Also, the Job Summary Stats Factbox ensures they have instant access to Job Budget and Job Actual Costs without having to click buttons to get to the data.

### 3. Task Details

The Task Detail Page is a Split Screen to show the Job Task List and its corresponding Planning Lines. The Planning Lines holds the that Task's Budget Entries.

This is the perfect place to create/edit your Job's Budget and Job's Price too. Think of this as your Estimating Worksheet.



DEERFIELD, 8 WP - SETTING UP EIGHT WORK AREAS - 1000 | WORK DATE: 1/28/2021

### Job Specific Task Detail

JOB TASK NO.	DESCRIPTION	BUDGET (TOTAL COST)	USAGE (TOTAL COST)	VARIANCE	% COMPLETE (COST)	PLANNED START DATE	START DATE	END DATE	EST. LABOR HRS	EST LABOR COST	EST MATERIAL COST	EST MISC
1000	Setting up Eight Work Areas	0.00	0.00	0.00	0.00				0.00	0.00	0.00	
1100	Preliminary Services	0.00	0.00	0.00	0.00				0.00	0.00	0.00	
1110	Determining Specifications	107.80	107.80	0.00	100.00	9/9/2019	9/7/2019	9/12/2019	2.00	107.80	0.00	
1120	Selecting Furnishings	107.80	251.35	-143.55	233.16	10/7/2019	10/7/2019	10/7/2019	2.00	107.80	0.00	
1130	Obtaining Customer Approval	107.80	121.28	-13.48	112.50	11/11/2019	11/11/2019	11/11/2019	2.00	107.80	0.00	
1190	Total Preliminary Services	323.40	480.43	-157.03	148.56				6.00	323.40	0.00	
1200	Assembling the Furniture etc.	0.00	0.00	0.00	0.00				0.00	0.00	0.00	
1210	Assembling the Furniture etc.	12,000.10	206.00	11,794.10	1.72	1/27/2021	1/27/2021	1/27/2021	20.00	638.00	10,362.10	1.
1220	ASB-35000021- Net T-Tap Mod...	761.48	8.48	753.00	1.11	1/18/2021	1/18/2021	1/18/2021	20.00	753.00	8.48	
1290	Total Assembling the Furniture	12,761.58	214.48	12,547.10	1.68				40.00	1,391.00	10,370.58	1.
1300	Closing the Job	0.00	0.00	0.00	0.00				0.00	0.00	0.00	
1310	Meeting with the Customer	372.60	1,263.99	-891.39	339.24	1/31/2021	1/31/2021	1/31/2021	4.00	215.60	157.00	
1390	Total Closing the Job	372.60	1,263.99	-891.39	339.24				4.00	215.60	157.00	
9990	Total Setting up Eight Work ...	13,457.58	1,958.90	11,498.68	14.56				50.00	1,930.00	10,527.58	1.

JOB TASK NO.	LINE TYPE	PLANNIN... DATE	PLANNED DELIVERY DATE	DOCUME... NO.	TYPE	NO.	DESCRIPTION	CHANGE TYPE	CHANGE REFERENCE	JOB PO CH...	QUANTITY	FIX... CO...	EX... LINE	UNIT COST	TOT.
1110	Budget	9/7/2019	9/7/2019		Resource	MARY	Meeting with Customer	Original			2			53.90	
1110	Billable	9/12/2019	9/12/2019		Resource	BILLINGS	Billings	Original			1			0.00	
1110	Budget	9/9/2019	9/9/2019		Resource	MARK	Mark Hanson	Billable Cha...	SCHEDULE		0			31.90	

You can instantly see what is budgeted for Labor, Material, and/or Other Costs of each Task Line by clicking the Task Line.

Scroll to the right of the top Detail Page. You will see Budgeted Cost per the 3 Categories, total Budget, and Actual Cost per the 3 Cost Categories, Total Actual Cost, and Budgeted Billing information too. Scroll the upper window to the right and check it out.

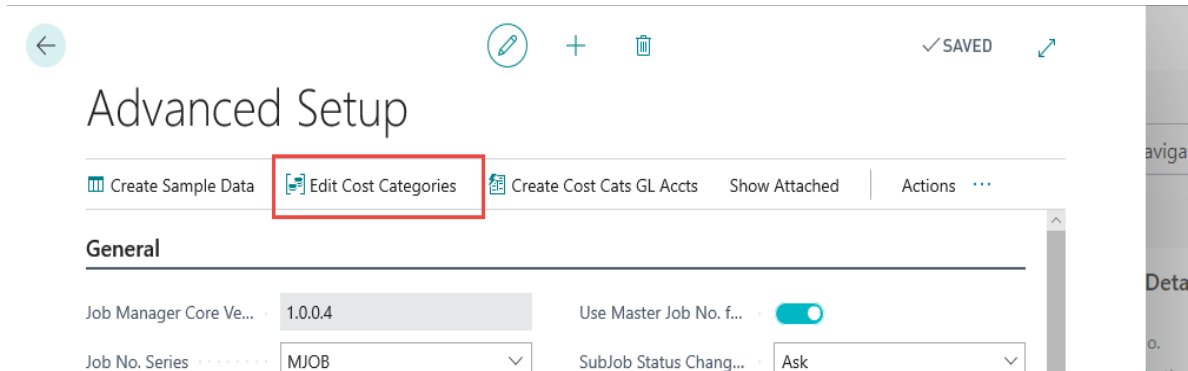
Scroll right and left in the lower Job Planning Line Window too. The "Type" field on the Job Planning Lines determines if the estimated cost is Material, Labor, or Other.

#### 4. Unlimited Cost Categories

We provide unlimited user defined Cost Categories within 10 Fixed Cost Category Groups

Each user defined Cost Category must be assigned to one of the 10 fixed Cost Category Groups.

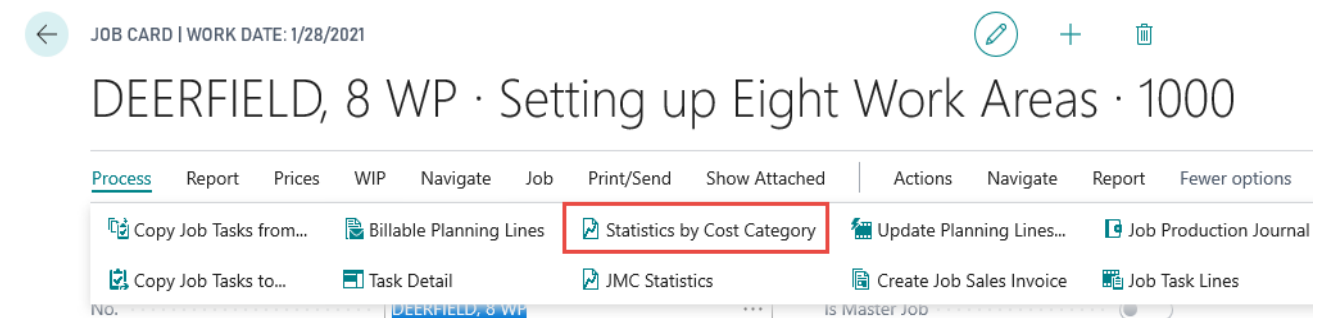
This enables Statistics by Cost Categories.



← COST CATEGORIES | WORK DATE: 1/28/2021 ✓ SAVED ↗

🔍 Search + New Edit List Delete Show Attached 📄 Open in Excel

CODE	DESCRIPTION	COST CATEGORY GROUP
EXPENSE	Expense	Expense
FIELDLABOR	Field Labor	Field Labor
FREIGHT	Freight	Transport
HOTEL	Hotel Expense	Expense
MACHINE	Machine	Machine
MATERIAL	Material	Material
MISC	Miscellaneous	Misc
OVERHEAD	Overhead	Overhead
SERVICE	Service	Service
SHOPLABOR	Shop Labor	Labor
SUBCON	Sub Contracting	Outside Processing
TRANSPORT	Transportation	Transport



5. Purchasing with the Purchases/BOM Lines Feature:

This Page enables the Purchasing of your Job’s Materials or Subcontractors.

We have added the ability to “Push” the items you need (Demand) to the Requisition Worksheet with “Create Requisitions”. The Requisition Worksheet takes over from there.

← JOB CARD | WORK DATE: 1/28/2021 ✎ + 🗑

## DEERFIELD, 8 WP · Setting up Eight Work Areas · 1000

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Process Report Prices WIP Navigate Job Print/Send Show Attached Actions Navigate Report Fewer options

📄 Copy Job Tasks from...
📄 Billable Planning Lines
📄 Statistics by Cost Category
📄 Update Planning Lines...
📄 Job Production Journal
📄 Purchase/BOM Lines

📄 Copy Job Tasks to...
📄 Task Detail
📄 JMC Statistics
📄 Create Job Sales Invoice
📄 Job Task Lines
📄 Job Change References

NO. DEERFIELD, 8 WP IS MASTER JOB

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🔍 Search Edit List Process Report Show Attached Open in Excel Actions Report Fewer options

EDIT - JOB PLANNING PURCHASES - DEERFIELD, 8 WP - SETTING UP EIGHT WORK AREAS - 1000

SE... TO JO...	PLANNING DATE	JOB TASK NO.	TYPE	NO.	DESCRIPTION	QUANTITY	JTD USAGE QTY	OUTSTANDI... QTY	QTY. TO REQUISITION	QTY. ON REQUISITION	COMMENT	UNIT OF MEASURE CODE	LOCATION CODE	UN
<input type="checkbox"/>	1/18/2021	1220	Item	1800	Handlebars	4	4.00					PCS		
<input type="checkbox"/>	1/27/2021	1210	Item	1896-S	ATHENS Desk	8	0.00	8.00				PCS		
<input type="checkbox"/>	1/27/2021	1210	Item	1906-S	ATHENS Mobile Pedestal	8	0.00	8.00				PCS		
<input type="checkbox"/>	1/27/2021	1210	Item	1908-S	LONDON Swivel Chair, blue	8	0.00	8.00				PCS		
<input type="checkbox"/>	1/27/2021	1210	Item	1928-W	ST.MORITZ Storage Unit/Drawers	4	0.00	4.00				PCS		
<input type="checkbox"/>	1/27/2021	1210	Item	1964-S	TOKYO Guest Chair, blue	3	0.00	3.00				PCS		
<input type="checkbox"/>	1/27/2021	1210	Item	1976-W	INNSBRUCK Storage Unit/W.D...	4	0.00	4.00				PCS		
<input type="checkbox"/>	1/27/2021	1210	Item	1996-S	ATLANTA Whiteboard, base	3	0.00	3.00				PCS		
<input type="checkbox"/>	1/31/2021	1310	Item	70000	Side Panel	10	10.00					PCS		
<input type="checkbox"/>	1/27/2021	1210	G/L Account	7510	Heat Treating	1	0.00	1.00						

Close

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🔍 Search Edit List Process Report Show Attached Open in Excel Actions Report Fewer options

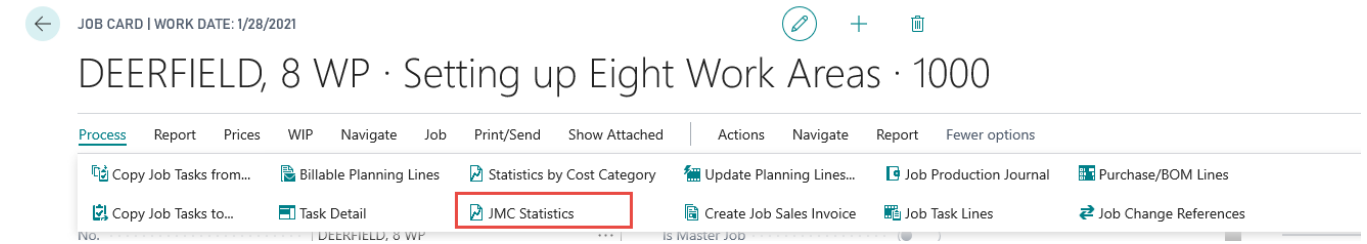
✓ Mark All for Stock Transfer
📄 Stock Transfer -...opy to Job Jnl
📄 Open Job Journal
📄 Auto Fill Qty. to Requisition
📄 Create Requisitions

### 6. Job Manager Core Statistics (JMC Statistics)

This page provides real time Statistics of your Job or Master Job. It is easy to read, and always up to date.

The Projections tab will let you enter Job to Date Percent Complete and then it calculates the projected “Cost at

Completion". This gives you an even better comparison to your Budgeted Costs.



The screenshot shows the 'JMC Statistics' report for 'DEERFIELD, 8 WP · Setting up Eight Work Areas · 1000'. The report title is '..B STATISTICS | WORK DATE: 1/28/2021'. The main content is a table titled 'Cost Variance' with the following data:

	CURR. BUD...	PO OUTSTA...	PO RECV'D ...	ACTUALS	VARIANCE	PERCENT C...
Billable Amount	118,714.00			0.00	118,714.00	0%
Labor Hours	50.00			10.75	39.25	22%
Field Labor Ho...	0.00			0.00	0.00	0%
Machine Hours	8.00			0.00	8.00	0%
Labor Cost	1,930.00			480.43	1,449.57	25%
Field Labor Cost	0.00			0.00	0.00	0%
Machine Cost	0.00			0.00	0.00	0%
Material Cost	10,527.58	8.48	0.00	1,428.47	9,099.11	14%
Expense	0.00	0.00	0.00	0.00	0.00	0%
Service	0.00	0.00	0.00	0.00	0.00	0%
Outside Proces...	0.00	0.00	0.00	0.00	0.00	0%
Overhead	0.00	0.00	0.00	0.00	0.00	0%
Miscellaneous	1,000.00			50.00	950.00	5%
Transport	0.00	0.00	0.00	0.00	0.00	0%
Totals	13,457.58	1,108.48	0.00	1,958.90	11,498.68	14.56
Profit Amount	105,256.42			-1,958.90		
Profit Percent	88.66			0.00		

7. Reporting

Job Manager Core provides nine (9) core Job Costing and Analytical Reports.



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Jobs Contacts Customers Vendors Items Resources Requisition Worksheets Job Journal Job G/L Journals Recurring Job Journals Job Registers

Jobs: Custom filtered Search + New Delete Process Report Navigate Job Show Attached Open in Excel Actions Navigate Report Fewer options

NO.	IS MAJ. JOB	DESCRIPTION	DESCRIPTION 2	TEMPLATE SOURCE	SOURCE NO.	BILL-TO CUSTOMER NO.	BILL-TO NAME
1000	<input checked="" type="checkbox"/>	Template for Master Jobs		Project		CRONUS USA	CRONUS US
DEERFIELD...	<input type="checkbox"/>	Setting up Eight Work Areas		Project	40000	Deerfield Gra	Deerfield Wa
GUILDFOR...	<input type="checkbox"/>	Setting up Ten Conference Roo...		Project	50000	Guildford Wa	Guildford Wa

Filters: All, Planning Jobs, Quote Jobs, \*Open Jobs, Completed Jobs

Filter list by: Status (Open), No. (ERFIELD, 8 WP|GUILDFORD, 10 CR)

Filter totals by... Reset filters

Report menu: Job Actual to Budget, Job Analysis, Job - Planning Lines, Job - Suggested Billing, Jobs per Customer, Items per Job, Jobs per Item, Preview Job Quote, Send Job Quote, Job Manager Core, Job Manager Reports, Job Analysis Budget/Actual, Job Analysis by Customer, Job Planning Line Demand, Planning Availability, Job BOM Shortage Report, Job Traveler Task/Planning, Job Billing Analysis, Job Purchase Order Lines, Job Cost Audit/Variance, Resource Ledger Entries

8. Change Job Status to "Complete"

Job Manager Core now error traps during the change of Job Status to Complete. If there are Open Purchase Orders or Open Invoices linked to this Job, the change to Completed will fail.

← JOB CARD | WORK DATE: 1/28/2021

# DEERFIELD, 8 WP · Setting up Eight Wc

Process Report Prices WIP Navigate Job Print/Send Show Attached Act

**✖ The page has an error. Correct the error or try to [revert the change](#).**

**Posting**

Status **✖** Completed % Invoiced

Job Posting Group Location Co

% Completed 14.56 Component

**Validation Results**  
 You cannot set Status to Completed. There are outstanding purchase lines for this Job. See Purchase Order 106026

**Duration**

9. Material Consumption Options

- a. Forward Flushing
- b. Backward Flushing
- c. Manual Flushing (most used)

- For Forward or Backward select: "Purchase/BOM Lines" on the menu.
- Check the Items you want to copy to the Job Journal.
- Use "Stock transfer" option to carry out the copy function.
- "Open Job Journal" and Post to the Job Ledger Entries.
- It is a timing issue: Forward (at the start of the Job), Backward (at the end of the Job) – Your Choice.

SE... TO JO... ↑	PLANNIN... DATE	JOB TASK NO.	TYPE	NO.	DESCRIPTION	QUANTITY	JTD USAGE QTY	OUTSTANDI... QTY	QTY. TO REQUISITION	QTY. ON REQUISITION	COMMENT
<input type="checkbox"/>	1/27/2021	1210	Item	1896-S	ATHENS Desk	8	0.00	8.00		-	
<input type="checkbox"/>	1/27/2021	1210	Item	1906-S	ATHENS Mobile Pedestal	8	0.00	8.00		-	
<input type="checkbox"/>	1/27/2021	1210	Item	1908-S	LONDON Swivel Chair, blue	8	0.00	8.00		-	
<input type="checkbox"/>	1/27/2021	1210	Item	1928-W	ST.MORITZ Storage Unit/Drawers	4	0.00	4.00		-	
<input type="checkbox"/>	1/27/2021	1210	Item	1964-S	TOKYO Guest Chair, blue	3	0.00	3.00		-	
<input type="checkbox"/>	1/27/2021	1210	Item	1976-W	INNSBRUCK Storage Unit/W.D...	4	0.00	4.00		-	
<input type="checkbox"/>	1/27/2021	1210	Item	1996-S	ATLANTA Whiteboard, base	3	0.00	3.00		-	
<input type="checkbox"/>	1/27/2021	1210	G/L Account	7510	Heat Treating	1	0.00	1.00		-	
<input type="checkbox"/>	1/18/2021	1220	Item	1800	Handlebars	4	4.00			-	
<input type="checkbox"/>	1/31/2021	1310	Item	70000	Side Panel	10	10.00			-	

### Full Feature List

- New Role Center designed specifically for the Job Costing Users
- Create “Projects” by Grouping Jobs (Master Job and Sub-Jobs)
- Task Details List with Split View to the Job Planning Line Details
- Unlimited User Defined Cost Categories within 9 Cost Category Groups
- New easy to read Job Cost Statistics (Our most viewed Page)
- “Change Job Status to Complete” now checks for Open Sales Invoices and Purchase Orders
- Reporting is extended with 9 new Job Cost and Analytical reports
- Easy Job Procurement with Planning Line Demand sent right to the Requisition Worksheet with the Job Number and Task Number so the PO reflects the new Committed Cost
- General Ledger Chart of Accounts are expanded to include the Cost Categories. This enables easy Purchase Order creation for Outside Services and Subcontractors.
- Job Manager Core Installation process will automatically setup default values for the following: Item’s Cost Categories, Resource’s Cost Categories, Master Job Number Series, Bonus Chart of Accounts, and much more.
- Resource Ledger Entries have been enhanced to include the Job Task Number and Cost Category
- Material Consumption Options: Forward, Backward, or Manual
- Committed Cost shows at the Job Level and the Task Level too
- Percent Complete by Cost or Hours shows at the Job Level and the Task Level
- Projected Cost at Completion can be based on Field Reporting of Percent Complete
- New Cost Category Statistics Page
- Requisition Worksheet enhanced with Job Task Number. Carries to PO on “Carry Out” action. This is ideal for direct entry to the Requisition Worksheet.
- Access to a new choice called “Billable Planning Lines” on the Master and Sub Jobs.
- Billable Planning Lines functionality is different than the standard function called Create Job Sales Invoice from the Job Card only. This enables you to select the line items you want to bill and tracks the actual Posted Sales Invoices on the line.
- New option on Job Card to assign or re-assign that Job to a different Master Job. (All Supporting Tables are adjusted as well.)
- Production: Inventory Item Production (MTS)  
This can be informational on the Job Card or used in Job Planning Lines for Billing the Customer a specific part number.
- Enabled Purchasing from the Master Job level, and maintain Job/Task level details for PO Lines.
- New utility to change the Planning Line Start Dates and Quantities by Qty factor or reset the Planning Date. Ideal for adjusting a Job that had a delayed start date.
- New Summary Statistics Fact Box for the Job List and Job Card
- Change Order Management – on Planning Lines  
Added Change Type field on the Job Planning lines (default is "original")  
Added a Change Reference field on the Job Planning Lines with a supporting Change Order Number Reference table.  
Added a Change Statistics Fact Box on the Job Card and Job List for both Master and Sub Jobs.
- Percent Complete and Percent Invoiced  
Added both values to Summarized Fact Box and Master Job Statistics too.
- “Scheduled Start Date” filed added to the Task Line for quick planning.