



Job Manager Core: Setup and Workflow Guide

Setup and workflow 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.

Application Setup

To set up Job Manager Core after installation, you need to define some specific setup data that will allow you to fully utilize the functionality.

Open your company and then use the search function to find the Advanced Setup page. When the page opens for the first time, you will see that it is filled with some recommended default values

Advanced Setup

Create Sample Data Edit Cost Categories Create Cost Cats GL Accts Show Attached Actions Fewer options

General Show less

Job Manager Core Version 1.0.0.0

Job No. Series JOB

Master Job No. Series MJOB

Use Master for SubJob Defaults ☒

Use Master Job No. for SubJob ☒

SubJob Status Changes Master Ask

SubJob Extension -01

Status Init Value Open

G/L Data Country W1

JMC Startup Data Is Complete ☒

Purchasing

Req Direct Cost From Job Budget ☒

Startup Data Process

Updated WIP No. Series <input checked="" type="checkbox"/>	Created a Sample Sub Job <input checked="" type="checkbox"/>
Updated Jobs Setup <input checked="" type="checkbox"/>	Added Sample Tasks to Sub Job <input checked="" type="checkbox"/>
Added Job Manager Core Profile <input checked="" type="checkbox"/>	Batched Cost Categ to Items <input checked="" type="checkbox"/>
Setup Startup Cost Categories <input checked="" type="checkbox"/>	Batched Cost Categ to Resources <input checked="" type="checkbox"/>
Added a Job Posting Group <input checked="" type="checkbox"/>	MasterJob No. to Existing Jobs <input checked="" type="checkbox"/>
Added a CRONUS Samp Customer <input checked="" type="checkbox"/>	Updated Analysis Jobs <input checked="" type="checkbox"/>
Created a Sample Master Job <input checked="" type="checkbox"/>	Created Job Prod Job Template <input checked="" type="checkbox"/>

We recommend for initial setup that you leave the default values how they are when installed.

At the top of the Advanced Setup page, you will see an option for Create Sample Data which should be run.

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Advanced Setup

Create Sample Data Edit Cost Categories Create Cost Cats GL Accts Show Attached Actions Fewer options

General Show less

Job Manager Core Version	1.0.0.0	SubJob Status Changes Master	Ask
Job No. Series	JOB	SubJob Extension	-01
Master Job No. Series	MJOB	Status Init Value	Open
Use Master for SubJob Defaults	<input checked="" type="checkbox"/>	G/L Data Country	W1
Use Master Job No. for SubJob	<input checked="" type="checkbox"/>	JMC Startup Data Is Complete	<input checked="" type="checkbox"/>

This is an automatic process that sets up base categories for each function of Job Manager Core, and adds some functionality to any existing Job data.

EDIT - JMC STARTUP DATA PROCESS

Options

- Create/Update WIP No. Series ☒
- Create/Update Jobs Setup ☒
- Add the Job Manager Core Profile ☒
- Add StartUP Cost Categories ☒
- Add a Job Posting Group ☒
- Add a Sample Customer for Master Job ☒
- Add a Master Job ☒
- Add a sample Sub Job ☒
- Add Tasks to the Sub Job ☒
- Batch Cost Categories to Items ☒
- Batch Cost Categories to Resources ☒
- Add the Master Job No. to Existing Jobs ☒
- Add Job Prod Jnl Template ☐

Schedule... OK Cancel

The process takes a very short amount of time to complete, and when finished, the setup page will look like the page below. Notice that the option boxes have been checked to indicate that each process has completed. The Created Job Prod Jnl Template option will not be checked – it gets completed later.

Startup Data Process


- | | |
|--|---|
| Updated WIP No. Series <input checked="" type="checkbox"/> | Created a Sample Sub Job <input checked="" type="checkbox"/> |
| Updated Jobs Setup <input checked="" type="checkbox"/> | Added Sample Tasks to Sub Job <input checked="" type="checkbox"/> |
| Added Job Manager Core Profile <input checked="" type="checkbox"/> | Batched Cost Categ to Items <input checked="" type="checkbox"/> |
| Setup Startup Cost Categories <input checked="" type="checkbox"/> | Batched Cost Categ to Resources <input checked="" type="checkbox"/> |
| Added a Job Posting Group <input checked="" type="checkbox"/> | MasterJob No. to Existing Jobs <input checked="" type="checkbox"/> |
| Added a CRONUS Samp Customer <input checked="" type="checkbox"/> | Updated Analysis Jobs <input checked="" type="checkbox"/> |
| Created a Sample Master Job <input checked="" type="checkbox"/> | Created Job Prod Jnl Template <input type="checkbox"/> |

Job Manager Core


Setup and Workflow Guide

The following important areas will be automatically setup for you. You can change them later as you learn more about the process. The list below is the activities that the Create Startup Data process is handling automatically. If you need to make changes to the setup later, you will know what has been provided.

1. Setup of Job No. Series – The Startup Data sets up both a Job No. Series and a Master Job No. Series

SELECT - NO. SERIES LIST + New 

CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	DE... NOS.	MA... NOS.	DATE OR...
ITEM3	Loose Hardware	70200	70299	–	70201	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ITEM4	Finished	1896-S	2996-S	–	2000-S	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ITEM5	Assembly BOM	1924-W	2096-W	–	1992-W	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JJNL-GEN	Job Journal	J00001	J01000	1/28/2021	J00002	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JJNL-REC	Recurring Job Journal	J01001	J02000	–	–	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JOB	⋮ JOB	J00010	J99990	1/28/2021	J00030	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JOB-WIP	Job-WIP	WIP0000001	WIP9999999	1/28/2021	WIP0000005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LOT	Lot Numbering	LOT0001	LOT9999	–	–	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SELECT - NO. SERIES LIST + New 

CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	DE... NOS.	MA... NOS.	DATE OR...
M-FIRMP	Firm Planned Orders	101001	102999	–	–	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M-FIRMP-M	Production Order(Firm Planned)	1010001	1011999	1/31/2021	1010006	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MJOB	⋮ Master Jobs	1000	–	1/28/2021	1040	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
M-PLAN	Planned orders	101001	102999	1/28/2021	101001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M-PLAN-M	Production Order(Planned)	109001	1010999	1/31/2021	109001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M-QUO	Sales Quote	1001	2999	–	–	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M-REL	Released orders	101001	102999	1/1/2020	101003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Creates a startup set of Cost Categories as shown below. You can access this page from the Search Bar if needed.

Job Manager Core

Setup and Workflow Guide

← 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
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

3. Populates the Cost Category field on existing items, resources, and job planning G/L Accounts

Note that if an Item is Type: Inventory, then the Cost Category will be set to MATERIAL. If the item is a Type: Service then the Cost Category is set to SERVICE.

← ITEM CARD | WORK DATE: 1/28/2021

1110 · Rim

Process Item History Special Sales P...ces & Discounts Request Approval Show Attached Actions Navigate

Item Show more

No.	1110 ...	Base Unit of Measure ..	PCS
Description	Rim	Item Category Code ..	
Blocked	<input type="checkbox"/>	Cost Category	MATERIAL
Type	Inventory		

Inventory Show more

For Resources of Type: Person – the Cost Category is SHOPLABOR. For Resources of Type: Machine, the Cost Category is set to MACHINE

←

RESOURCE CARD | WORK DATE: 1/28/2021

+

LINDA · Linda Martin

Process

Report

Resource

Navigate

Prices

Planning

Show Attached

Actions

Navigate

Report

Fewer c

General Show less

No.

LINDA

Name

Linda Martin

Type

Person

Base Unit of Measure

HOURL

Search Name

LINDA MARTIN

Resource Group No.

Blocked

Privacy Blocked

Last Date Modified

3/24/2019

Use Time Sheet

Time Sheet Owner ...

Time Sheet Approv...

Cost Category

SHOPLABOR

Resc

←

RESOURCE CARD | WORK DATE: 1/28/2021

+

LIFT · Lift for Furniture

Process

Report

Resource

Navigate

Prices

Planning

Show Attached

Actions

Navigate

Report

Fewer c

General Show less

No.

LIFT

Name

Lift for Furniture

Type

Machine

Base Unit of Measure

HOURL

Search Name

LIFT FOR FURNITURE

Resource Group No.

Blocked

Privacy Blocked

Last Date Modified

1/28/2021

Use Time Sheet

Time Sheet Owner ...

Time Sheet Approv...

Cost Category

MACHINE

Resc

General Ledger Cost Categories are setup with the Create GL Cost Category option in Advanced Setup – we will cover this more in depth later in the manual

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← CHART OF ACCOUNTS | WORK DATE: 1/28/2021

Search + New Edit List Delete Edit View Process Report Show Attached Open in Excel

NO.	NAME	NET CHANGE	BALANCE	IN	Note
7481	Job Cost Adjmt., Resources	—	—		
7490	Cost of Resources Used	—	—		
7495	Total Cost of Resources	—	—		
7500	Planning line Costs-BEGIN	—	—		
7501	Planning line Cost-EXPENSE	20.00	20.00		
7502	Planning line Cost-FIELDLABOR	—	—		
7503	Planning line Cost-FREIGHT	50.00	50.00		
7504	Planning line Cost-MACHINE	—	—		
7505	Planning line Cost-MATERIAL	20.00	20.00		
7506	Planning line Cost-MISC	—	—		
7507	Planning line Cost-OVERHEAD	—	—		
7508	Planning line Cost-SERVICE	—	—		
7509	Planning line Cost-SHOPLABOR	—	—		
7510	Planning line Cost-SUBCON	—	—		
7512	Planning line Cost-TRANSPORT	—	—		
7520	Job WIP G/L Costs Applied	—	—		
7530	Job WIP Job Costs Applied	—	—		

← G/L ACCOUNT CARD | WORK DATE: 1/28/2021

7501 · Planning line Cost-EXPENSE

Process Account Balance Show Attached More options

General Show more

No.	7501	Balance	20.00
Name	Planning line Cost-EXPENSE	Reconciliation Acco... ..	<input type="checkbox"/>
Income/Balance	Income Statement	Automatic Ext. Texts ..	<input type="checkbox"/>
Account Category	Cost of Goods Sold	Direct Posting	<input checked="" type="checkbox"/>
Account Subcategory	Blocked	<input type="checkbox"/>
Debit/Credit	Both	Last Date Modified ...	
Account Type	Posting	Omit Default Descr. ...	<input type="checkbox"/>
Totaling	Cost Category	EXPENSE

Notes +


(There




4. Automatically creates the Job Manager Core Role Center (Profile) To use the Job Manager Core software you should access and use the Job Manager Core role center. The Create Startup Data process adds a Job

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Manager Core Role Center to your profile list. If you do not find it in the list, then you can insert the Job Manager Core profile and enter page #14190802. You should select it as the default if you want the unassigned users to get to the Job Manager Core Role Center when they log in. The Create Startup Data process inserts the profile, but does not set it as the default.


← PROFILES | WORK DATE: 1/28/2021 


Search + New Manage Process Resource Translation Show Attached  Open in Excel ...  

PROFILE ID	DESCRIPTION	SCOPE	EXTENSION NAME	ROLE CENTER ID	DE... RO... CE...	DIS... PE...
ORDER PR...	Sales Order Processor	System		9006	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ORDER PR...	Sales Order Processor - Non-c...	System		9006	<input type="checkbox"/>	<input type="checkbox"/>
OUTBOUN...	Outbound Technician - Custom...	System		9017	<input type="checkbox"/>	<input type="checkbox"/>
PRESIDENT	President	System		9019	<input type="checkbox"/>	<input type="checkbox"/>
PRESIDENT...	President - Small Business	System		9020	<input type="checkbox"/>	<input type="checkbox"/>
PRODUCTI...	Production Planner	System		9010	<input type="checkbox"/>	<input type="checkbox"/>
PROJECT M...	Project Manager	System		9015	<input type="checkbox"/>	<input type="checkbox"/>
PURCHASI...	Purchasing Agent	System		9007	<input type="checkbox"/>	<input type="checkbox"/>
RAPIDSTAR...	RapidStart Services Implementer	System		9021	<input type="checkbox"/>	<input type="checkbox"/>
RESOURCE ...	Resource Manager	System		9014	<input type="checkbox"/>	<input type="checkbox"/>
SALES AND...	Sales and Relationship Manager	System		9026	<input type="checkbox"/>	<input type="checkbox"/>
SALES MA...	Sales Manager	System		9005	<input type="checkbox"/>	<input type="checkbox"/>
SECURITY ...	Administration of users, user g...	System		9024	<input type="checkbox"/>	<input type="checkbox"/>
SHIPPING ...	Shipping and Receiving - Orde...	System		9008	<input type="checkbox"/>	<input type="checkbox"/>
SHIPPING ...	Shipping and Receiving - Ware...	System		9000	<input type="checkbox"/>	<input type="checkbox"/>
SHOP SUPE...	Shop Supervisor - Manufacturi...	System		9012	<input type="checkbox"/>	<input type="checkbox"/>
SHOP SUPE...	Shop Supervisor - Manufacturi...	System		9011	<input type="checkbox"/>	<input type="checkbox"/>
TEAM MEM...	Team Member	System		9028	<input type="checkbox"/>	<input type="checkbox"/>
WAREHOU...	Warehouse Worker - Warehou...	System		9009	<input type="checkbox"/>	<input type="checkbox"/>
CCS JMC P...	Job Manager Core	Tenant	Job Manager Core	14190802	<input type="checkbox"/>	<input type="checkbox"/>

You can assign a specific Role Center to a user by using the “My Settings” option in the Role Center and then selecting the new Job Manager Core Role Center for the user.



EDIT - MY SETTINGS 

Role Center	Job Manager Core	...
Company	CRONUS International Ltd.	...
Work Date	1/28/2021	× 

REGION & LANGUAGE

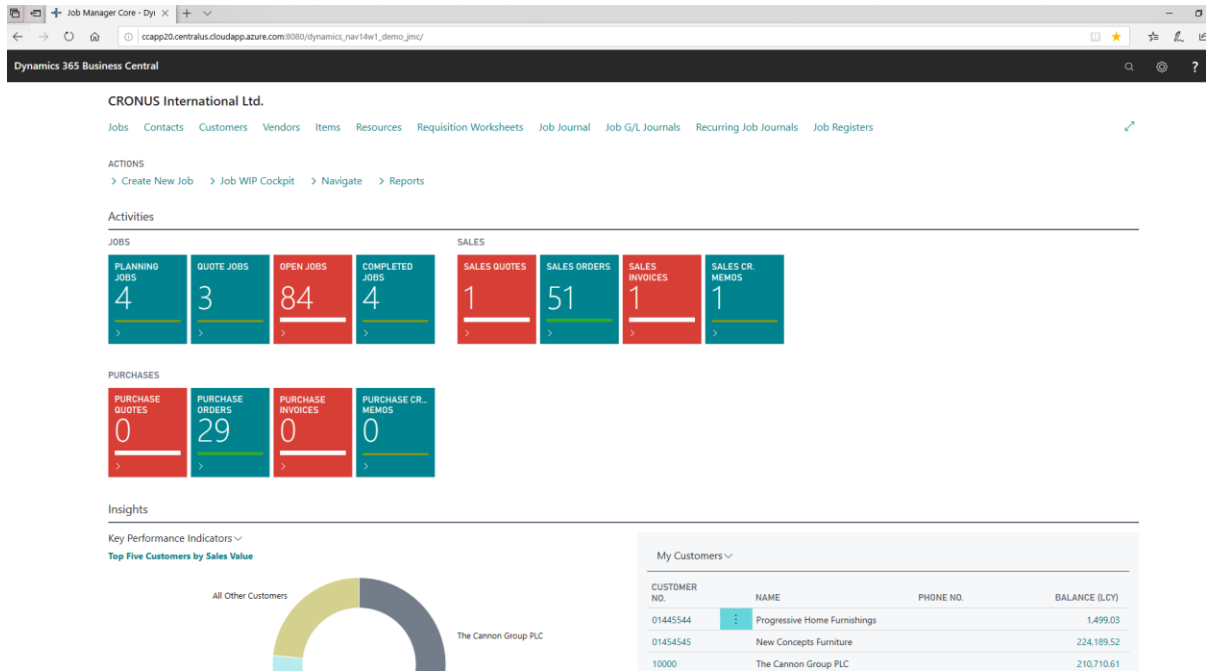
Region	English (United States)	...
Language	English (United States)	...
Time Zone	(UTC-05:00) Eastern Time (US & Ca...	...
Notifications	Change when I receive notifications.	

Your last sign in was on 04/07/20 11:30 AM.

When the user logs in to Business Central again, they will be in the Job Manager Core Role Center

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5. Sets up the Job WIP No series for processing WIP transactions

← NO. SERIES | WORK DATE: 1/28/2021 ✓ SAVED ↗

CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	DE... NOS.	M N
JOB-WIP	Job-WIP	WIP0000001	WIP9999999	1/28/2021	WIP0000005	<input checked="" type="checkbox"/>	
LOT	Lot Numbering	LOT0001	LOT9999	—	—	<input checked="" type="checkbox"/>	
MACHCTR	Machine Centers	M00010	M99990	—	—	<input checked="" type="checkbox"/>	
M-FIRMP	Firm Planned orders	101001	102999	—	—	<input checked="" type="checkbox"/>	

6. Sets up the Jobs Setup, if not populated

Jobs Setup

Show Attached

General Show more

Automatic Update Jo... ☐

Default WIP Method ... COMPLETED CONTRACT

Apply Usage Link by ... ☒

Default WIP Posting ... Per Job

Allow Budget/Billable ... ☒

Default Job Posting G... SETTING UP

Numbering

Job Nos. ... JOB

Job WIP Nos. ... JOB-WIP

7. Sets up the SETTING UP Job Posting Group, if it does not already exist.

JOB POSTING GROUPS | WORK DATE: 1/28/2021

CODE	DESCRIPTION	WIP COSTS ACCOUNT	WIP ACCRUED COSTS ACCOUNT	JOB COSTS APPLIED ACCOUNT	ITEM COSTS APPLIED ACCOUNT	RESOURCE COSTS APPLIED ACCOUNT	G/L COSTS APPLIED ACCOUNT	JOB COSTS ADJUSTME... ACCOUNT	G/L EXPENSE ACC. (CONTRACT)	V
SETTING UP	Setting up furniture	2231	2232	7530	7180	7480	7520	7181	6610	2

8. Creates a Template Master Job Automatically

CRONUS International Ltd.

Jobs	Contacts	Customers	Vendors	Items	Resources	Requisition Worksheets	Job Journal	Job G/L Journals	Recurring Job Journals	Job
Jobs: Open Jobs				Process	Report	Navigate	Job	Show Attached		
NO.	DESCRIPTION	TEMPLATE SOURCE	SOURCE NO.	STARTING DATE	STATUS	ENDING DATE	BILL-TO CUSTOMER NO.	BILL-TO NAME		
1000	Template for Master Jobs	Project			Open		CRONUS USA	CRONUS USA, Inc.		

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9. Batch populates the Master Job on existing transactional records. Refresh the Jobs List page to get existing jobs to sort below the Master Job. Typically, Guilford and Deerfield jobs will be assigned to the new Master Job template.

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

DEERFIELD, 8 WP · Setting up Eight Work Areas ·

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

General Show less

No.	DEERFIELD, 8 WP ...	Bill-to Post Code	GL1 9HM ...
Sell-to Customer No. ...	40000 ▾	Bill-to City	Gloucester ...
Description	Setting up Eight Work Areas	Bill-to Country/Regi... ▾	GB
Description 2		Bill-to Contact	Mr. Kevin Wright
Is Template	<input checked="" type="checkbox"/>	Search Description ...	SETTING UP EIGHT WORK ARE.
Template Source	Project ▾	Is Master Job	<input checked="" type="checkbox"/>
Source No.	▾	Master Job No.	1000
Job Qty Ordered	1.00	Project Code	▾

CRONUS International Ltd.

Jobs	Contacts	Customers	Vendors	Items	Resources	Requisition Worksheets	Job Journal	Job G/L Journals	Recurring Job Journals	Job Re
Jobs: Open Jobs ▾	🔍 Search	+ New	🗑 Delete	Process ▾	Report ▾	Navigate ▾	Job ▾	Show Attached ▾	📄 Open in Excel	
NO.	DESCRIPTION	TEMPLATE SOURCE	SOURCE NO.	STARTING DATE	STATUS ▾	ENDING DATE	BILL-TO CUSTOMER NO.	BILL-TO NAME		
DESIGN	Template for Gorrie demo	Project			Open		01905893	Candoxy Canada Inc.		
1000	Template for Master Jobs	Project			Open		CRONUS USA	CRONUS USA, Inc.		
DEERFIELD, 8 WP	Setting up Eight Work Areas	Project		1/18/2021	Open	2/5/2021	40000	Deerfield Graphics Com		
GUILDFORD, 10 CR	Setting up Ten Conference Roo...	Project		1/1/2021	Open	1/31/2021	50000	Guildford Water Depart		

10. Creates new template sub jobs

CRONUS International Ltd.

Jobs	Contacts	Customers	Vendors	Items	Resources	Requisition Worksheets	Job Journal	Job G/L Journals	Recurring Job Journals	Job Registers
Jobs: Open Jobs ▾	🔍 Search	+ New	🗑 Delete	Process ▾	Report ▾	Navigate ▾	Job ▾	Show Attached ▾	📄 Open in Excel	Actions ▾
NO.	DESCRIPTION	TEMPLATE SOURCE	SOURCE NO.	STARTING DATE	STATUS ▾	ENDING DATE	BILL-TO CUSTOMER NO.	BILL-TO NAME		
0100-01	template for design	Project			Open		01905893	Candoxy Canada Inc.		
0100-02	Template for build	Project			Open		01905893	Candoxy Canada Inc.		

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11. Setup sample Tasks on the Sub Job

← JOB CARD | WORK DATE: 1/28/2021

0100-01 · template for design · 0100

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

General Show more

No. 0100-01 Is Master Job ☐

Sell-to Customer No. 01905893 Master Job No. 0100

Description template for design Person Responsible

Description 2

Is Template ☒ Customer PO No.

Blocked

Bill-to Customer No. 01905893 Last Date Modified 9/30/2019

Bill-to Contact No. Project Manager

Bill-to Name Candoxy Canada Inc.

Tasks Manage Line Fewer options

JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	PLANNED START DATE	START DATE	END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)
100000	Job	Begin-Total						
200000	Revenue	Begin-Total						
200001	Design Rev	Posting						
200002	Build Rev	Posting						
299999	Revenue Total	End-Total						
300000	Design	Begin-Total						
300001	Design Labour	Posting		3/20/2020	3/21/2020	1,710.00		3,000.00
399999	Design Total	End-Total				1,710.00		3,000.00
999999	Job Total	End-Total				1,710.00		3,000.00

When the Job Manager Core granule is installed, it creates the roles and permission sets for the granule. There are two permission sets that will automatically be available to any user with "SUPER" permissions.

← PERMISSION SETS | WORK DATE: 1/28/2021

Search + New Edit List Delete Permissions User Groups Copy Permission Set... Import Permission Sets Export Permission S

PERMISSION SET ↑	NAME	TYPE	EXTENSION NAME
INVT-POSTED TRANSFER	Read posted transfer orders	System	
INVT-SETUP	Inventory setup	System	
INVT-TRANSFER	Create transfer orders	System	
INVT-TRANSFER, POST	Post transfer orders	System	
JOB-JMC ALL	Job Manager Core	Extension	Job Manager Core
JOB-JMC SETUP	Job Manager Core Setup	Extension	Job Manager Core
JOB-JOBS	Read jobs and entries	System	
JOB-JOBS, EDIT	Edit jobs	System	
JOB-JOURNAL	Create entries in job journals	System	

These permissions would have to be added to any user who does not have SUPER permissions in order for that user to access the Job Manager Core functionality.

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The Installation process also creates the cue prompts for the system, the purpose of which is to activate the indicator bars for the tiles on the role center. These can be edited at a later time to reflect your business needs.

← CUE SETUP | WORK DATE: 1/28/2021
✓ SAVED ↗

USER NAME	TABLE NAME	CUE ID	CUE NAME	LOW RANGE STYLE	THR
	Activities Cue	4000	Replication Success Rate	Unfavorable	
	CRM Synch. Job Status Cue	2	Failed Synch. Jobs	Favorable	
	Sales Cue	2	Sales Quotes - Open	None	
	Sales Cue	3	Sales Orders - Open	None	
	Sales Cue	4	Ready to Ship	None	
	Sales Cue	5	Delayed	Favorable	
	Sales Cue	6	Sales Return Orders - Open	None	
	Sales Cue	7	Sales Credit Memos - Open	None	
	Sales Cue	8	Partially Shipped	Favorable	
	Sales Cue	9	Average Days Delayed	Favorable	
	Finance Cue	3	Purchase Documents Due Today	Favorable	
	Finance Cue	16	Overdue Purchase Documents	Favorable	
	Finance Cue	17	Purchase Discounts Next Week	Favorable	
	Finance Cue	18	Purch. Invoices Due Next Week	Favorable	
	Relationship Mgmt. Cue	14	Contacts - Duplicates	None	
	JM Core Cue	2	Sales Quotes	Unfavorable	
	JM Core Cue	3	Sales Orders	Unfavorable	
	JM Core Cue	9	Sales Invoices	Unfavorable	
	JM Core Cue	10	Sales Cr. Memos	Ambiguous	
	JM Core Cue	30	Purchase Quotes	Unfavorable	
	JM Core Cue	31	Purchase Orders	Unfavorable	
	JM Core Cue	32	Purchase Invoices	Unfavorable	
	JM Core Cue	33	Purchase Credit Memos	Ambiguous	
	JM Core Cue	65	Open Jobs	Ambiguous	
	JM Core Cue	66	Planning Jobs	Ambiguous	
	JM Core Cue	67	Quote Jobs	Ambiguous	
	JM Core Cue	68	Completed Jobs	Ambiguous	

CRONUS International Ltd.

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

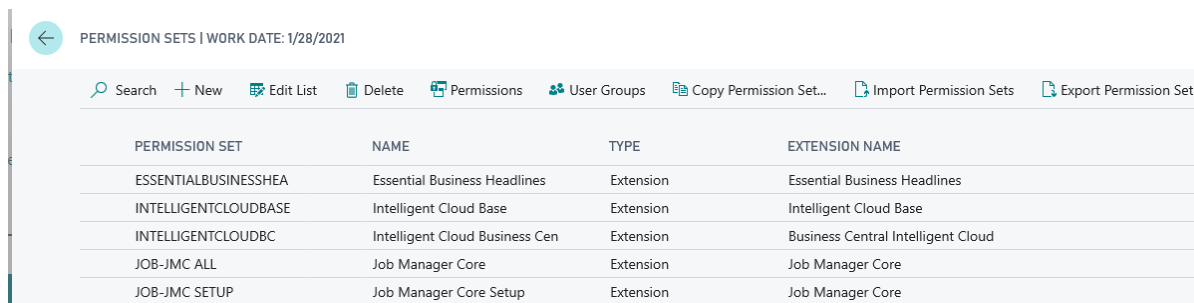
ACTIONS

> Create New Job > Job WIP Cockpit > Navigate > Reports

Activities

JOBS				SALES				PURCHASES			
PLANNING JOBS	QUOTE JOBS	OPEN JOBS	COMPLETED JOBS	SALES QUOTES	SALES ORDERS	SALES INVOICES	SALES CR. MEMOS	PURCHASE QUOTES	PURCHASE ORDERS	PURCHASE INVOICES	PURCHASE CR. MEMOS
4	3	84	4	1	51	1	1	0	29	0	0

Security is also setup as a part of the installation process. Job Manager Core specific Permission sets are automatically created when the extension is installed.



PERMISSION SETS | WORK DATE: 1/28/2021

Search + New Edit List Delete Permissions User Groups Copy Permission Set... Import Permission Sets Export Permission Sets

PERMISSION SET	NAME	TYPE	EXTENSION NAME
ESSENTIALBUSINESSHEA	Essential Business Headlines	Extension	Essential Business Headlines
INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Extension	Intelligent Cloud Base
INTELLIGENTCLOUDBC	Intelligent Cloud Business Cen	Extension	Business Central Intelligent Cloud
JOB-JMC ALL	Job Manager Core	Extension	Job Manager Core
JOB-JMC SETUP	Job Manager Core Setup	Extension	Job Manager Core

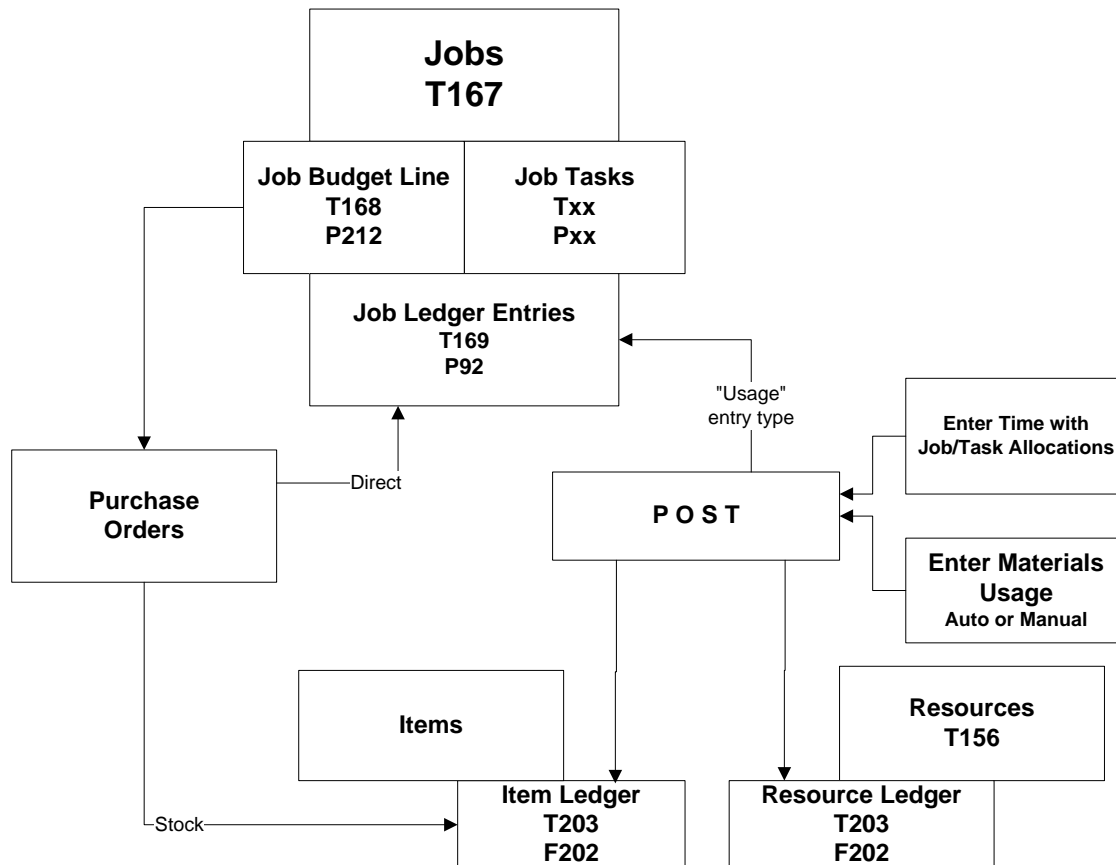
A User with SUPER permission set will be able to access all functionality in Job Manager Core. Users without the SUPER permission set will need to have several permission sets within their User Permission Set to allow them specific areas of use. You will need to manually add the new JMC permission sets to those users for them to access the functionality of Job Manager Core.

Application Workflow

The diagram below shows the basic workflow processes for Job Manager Core

Job Manager Core - Table Guide

For Companies that Provide a Service



Job Manager Core

Setup and Workflow Guide

There are a few additional tasks to consider as part of the setup for Job Manager Core. Once these processes are complete, we will review the workflow.

1. Define any additional Cost Categories. You can add new categories at any time, but it's easier to set them up all at once, if possible.

← 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
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
HOTEL	Hotel Expense	Expense
FREIGHT	Freight	Transport

See below where I have added two more Cost Categories, and purposefully set them to the Expense and Transport Cost Category Group: (Used the "New" option) You can have Multiple Cost Categories assigned to a single Cost Category Group – you might have "Labor" but call the Cost Categories "Design", "Accounting", "Installation", etc.

2. Indent your new chart of accounts. Earlier in the setup, we added some new accounts that related to the cost categories. It's a good idea to go to General Ledger, Chart of Accounts, and run the Indent Chart of Accounts action to be sure that the new account numbers that were set up for the cost categories are indented within the Begin and End Planning Line Accounts.

← CHART OF ACCOUNTS | WORK DATE: 1/28/2021

🔍 Search + New 🗑️ Edit List 🗑️ Delete ✎ Edit 👁 View **Process** Report Show Attached 📄 Open in Excel Actions Navigate Report Fewer options

🔍 Indent Chart of Accounts 📄 General Journal 🗑️ Close Income Statement 📄 G/L Register

NO.	NAME	NET CHANGE	BALANCE	INCOME/...	ACCOUNT SUBCATEGORY	TYPE
1000	BALANCE SHEET	—	—	Balance Sh...		Headr
1002	ASSETS	—	—	Balance Sh...	Assets	Begin-

3. You may have additional users to be set up. Add the new users, and then you can go to User Setup and select Edit List to add the new users. System users are per database, User Setup is per Company

Job Manager Core

Setup and Workflow Guide

Search

+ New

Edit List

Delete

Edit

View

Process

Navigate

Show Attached

Open in Excel

USERS + New

USER NAME	FULL NAME	STATE	WINDOWS USER NAME	LICENSE TYPE
DEMO	Demo	Enabled	-	Full User
DEMO_PROTA...	Demo Protagon	Enabled	-	Full User
DEMO_TRIAN...	Demo Triangel Business Solutions	Enabled	-	Full User
FAL	FAL	Enabled	-	Full User
VMADMIN	VMADMIN	Enabled	-	Full User

OK

Cancel

←

USER SETUP | WORK DATE: 1/28/2021

✓ SAVED

Search

+ New

Edit List

Delete

Show Attached

Open in Excel

USER ID	ALLOW POSTING FROM	ALLOW POSTING TO	RE... TIME	SALESPER... CODE	SALES RESP. CTR. FILTER	PURCHASE RESP. CTR. FILTER	SERVICE RESP. CTR. FILTER	TIME SH... AD...
FAL			<input type="checkbox"/>					<input checked="" type="checkbox"/>
DEMO			<input type="checkbox"/>					<input type="checkbox"/>
			<input type="checkbox"/>					<input type="checkbox"/>

- Your Employees should be entered in the Resource master with a Cost Category of SHOPLABOR, FIELDLABOR, or another Labor Cost Category that you have setup that has been assigned the "Labor" Cost Category Group. If you have machines, the machines should be entered in the Resource master with a Cost Category of MACHINE, or another Machine Cost Category that you have setup that has been assigned to the "Machine" Cost Category.
- Your chart of accounts and account schedules, inventory items, vendors and customers.
- The posting groups for Customer, Vendor, Item, Job

Creating Jobs – Template Job, Master Job, and Sub Job

Job Manager Core is designed to make the creation of new jobs and templates a streamlined process. A template is created for each type of job (Project or Item, large or small job, different processes – and each template can be modified after it has been pulled into the job. To create a new template job, the following steps are taken:

1. From the Job List, choose New in order to create a new template job. Say 'yes' when prompted to Create a New Master Job. This placeholder Master Job will have all of the template sub job types underneath it. The number is automatically assigned from the MJOB number series that was creating during setup.

JOB CARD | WORK DATE: 1/28/2021

1047 · Templates for Jobs

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

General

Show less






No.	1047	Bill-to Post Code	
Sell-to Customer No.		Bill-to City	
Description	Templates for Jobs	Bill-to Country/Region Code	
Description 2		Bill-to Contact	
Is Template	<input checked="" type="checkbox"/>	Search Description	TEMPLATES FOR JOBS
Template Source	Project	Is Master Job	<input checked="" type="checkbox"/>
Source No.		Master Job No.	
Job Qty Ordered	1.00	Project Code	
Qty Produced	0.00	Department Code	
Bill-to Customer No. *		Person Responsible	
Bill-to Contact No.		Customer PO No.	
Bill-to Name		Blocked	
Bill-to Address		Last Date Modified	4/13/2020
Bill-to Address 2		Project Manager	

It is not necessary to assign a Bill-to or Sell-to customer to this master job as it will simply hold the template for the jobs you will create for the specific customers later. You will want to add a description to the template master to differentiate it from other jobs on your list.

2. Then you will want to go back and create the template sub jobs based on the type of work your company provides. You may have one template sub job that is the basis of all work your company performs, or you may have multiple sub jobs based on the type of work the company performs. It is sometimes helpful to create your task lists first, to differentiate how many types of templates you may need. For this example we will use two templates, one for a simple service job, and one to build an item. To create the template sub job, we will again choose New from the job list, and when prompted, answer No to Create a New Master Job. This will bring up a list of Master jobs for you to choose from. You will want to choose the Master Job we just created for our Templates.

Job Manager Core

Setup and Workflow Guide

 Search	 New	Manage	Process	Report	Navigate	Job	Show Attached	 Open in Excel	More options
JOBS 									
NO.	DESCRIPTION	TEMPLATE SOURCE	SOURCE NO.	STARTING DATE	STATUS 	ENDING DATE	BILL-TO CUSTOMER NO.		
1021	Computer Display & Sidebao...	Project			Open		0190589		
999		Project			Open		0190589		
0100	Template for Gorrie demo	Project			Planning		0190589		
1025		Project			Open				
1026	Master Job Test	Project			Planning		10000		
1029	Test Job Actions	Item			Open		10000		
1030		Project			Open		0145454		
1031		Project			Open				
1032	New Build - Circle K	Project			Open		10000		
1033	Test Master CMH 1	Project			Open		10000		
1034	Test Master CMH 2	Project			Open		10000		
1035		Project			Open		10000		
1036	Template for Jobs	Project			Open		10000		
1037	New Master Service Job	Project			Open		10000		
1038		Project			Open		0145454		
1039 20200331	TEST 1 ON MAR 31, 2020	Project			Open		0145454		
1040		Project			Planning		0145454		
1041	Master job	Project			Open		0145454		
1042		Project			Open		0145454		
1043		Project			Open		0145454		
1044		Project			Open				
1047	Templates for Jobs	Project			Open				

OK

Cancel

When you select the master job, you will return then to the job card. Note that the system has assigned your sub job number based on the master job, as well as knowing this new sub job is NOT the master job, and it assigns the Master Job No. automatically.

Job Manager Core

Setup and Workflow Guide

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

1047-01 · Templates for Jobs · 1047

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

General Show less

<p>No. 1047-01 ...</p> <p>Sell-to Customer No. ▾</p> <p>Description Templates for Jobs</p> <p>Description 2 </p> <p>Is Template <input checked="" type="checkbox"/></p> <p>Template Source Project ▾</p> <p>Source No. ▾</p> <p>Job Qty Ordered 1.00</p> <p>Qty Produced 0.00</p> <p>Bill-to Customer No. * ▾</p> <p>Bill-to Contact No. ...</p>	<p>Bill-to Post Code ...</p> <p>Bill-to City ...</p> <p>Bill-to Country/Region Code ▾</p> <p>Bill-to Contact </p> <p>Search Description TEMPLATES FOR JOBS</p> <p>Is Master Job <input checked="" type="checkbox"/></p> <p>Master Job No. 1047</p> <p>Project Code ▾</p> <p>Department Code ▾</p> <p>Person Responsible ▾</p> <p>Customer PO No. </p>
---	---

You will want to change the Description of this job to match the description of the type of work you are doing. Additionally, you will check Is Template so that the system will know this is a template job in the future that we will copy Job Tasks and Planning Lines from. You will also need to assign a default Sell-to and Bill-to Customer No. for the template job. You will need to manually enter the Job Tasks (and Planning Lines) that are necessary. The following is the setup for a basic service job:

Tasks Manage Line Fewer options									
JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	PLANNED START DATE	START DATE	END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	
1000	Begin Job	Begin-Total		—	—	—	—	—	
2000	Planning	Posting		—	—	—	—	—	
3000	Provide Service	Posting		—	—	—	—	—	
4000	Test Service	Posting		—	—	—	—	—	
5000	Billing	Posting		—	—	—	—	—	
9999	⋮ Total Job	End-Total		—	—	—	—	—	

After entering the task list, you will want to choose the action Line, Function, Indent Job Tasks in order to indent the task list so that the posting tasks are enclosed within the begin and end totals for the job.

Job Manager Core

Setup and Workflow Guide

Tasks | Manage | Line | Fewer options

Job ▾ Dimensions ▾ Documents ▾ History ▾ **Functions ▾**

- Split Planning Lines...
- Change Dates...
- Indent Job Tasks**
- Copy >
- WIP >

NO.	DESCRIPTION	TYPE	DATE	END DATE
1000	Begin Job	Begin-Total		
2000	Planning	Posting		
3000	Provide Service	Posting		
4000	Test Service	Posting		
5000	Billing	Posting		
9999	Total Job	End-Total		

You will see that the Begin and End Totals are now highlighted to provide a visual notation for the user

Tasks Manage Line Fewer options									
JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	PLANNED START DATE	START DATE	END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	
1000	Begin Job	Begin-Total		—	—	—	—	—	
2000	Planning	Posting		—	—	—	—	—	
3000	Provide Service	Posting		—	—	—	—	—	
4000	Test Service	Posting		—	—	—	—	—	
5000	Billing	Posting		—	—	—	—	—	
9999	Total Job	End-Total		—	—	—	—	—	

Now you can enter the Planning Lines for the tasks on the job. You access the planning lines from the function Line, Job, Job Planning Lines. This data entry page allows you to enter the estimated resources and items needed to complete this job, per task. You can enter Budget planning lines (Intended to be usage for the job), Billable planning lines (used for creating invoices to the client from the job) or lines that are both budget and billable (often useful when the job will be billed as time and material) In this example, we have setup individual budget and billable planning lines.

Note that as you enter your resources or items onto the planning lines, the lines are updated with the unit cost and unit price, to provide an estimate of total cost and total price once the planning lines have been entered.

← TEMPLATES FOR JOBS 3000 PROVIDE SERVICE | WORK DATE: 1/28/2021 1047-01 ✓ SAVED ↗

Job Planning Lines

Search + New Edit List Delete Process Report Show Attached Open in Excel More options

JOB TASK NO.	LINE TYPE	PLANNING DATE	PLANNED DELIVERY DATE	DOCUMENT NO.	TYPE	NO.	DESCRIPTION	QUANTITY	FIX. CO.	EX. LINE	UNIT COST	TOTAL COST	UNIT PRICE	L AMOI
3000	Budget	1/28/2021	1/28/2021		Resource	MARK	Mark Hanson	8	<input type="checkbox"/>	<input type="checkbox"/>	31.90	255.20	54.00	43
3000	Budget	1/28/2021	1/28/2021		Resource	LIFT	Lift for Furniture	4	<input type="checkbox"/>	<input type="checkbox"/>	44.00	176.00	292.00	1,168
3000	Budget	1/28/2021	1/28/2021		Resource	ASSEMBLY	Assembly on-site	4	<input type="checkbox"/>	<input type="checkbox"/>	17.50	70.00	28.75	11

After all of the planning lines have been entered, you will see on the Job Card the 'estimate' for each of the tasks, as well as the total for the job.

Job Manager Core

Setup and Workflow Guide

← JOB CARD | WORK DATE: 1/28/2021



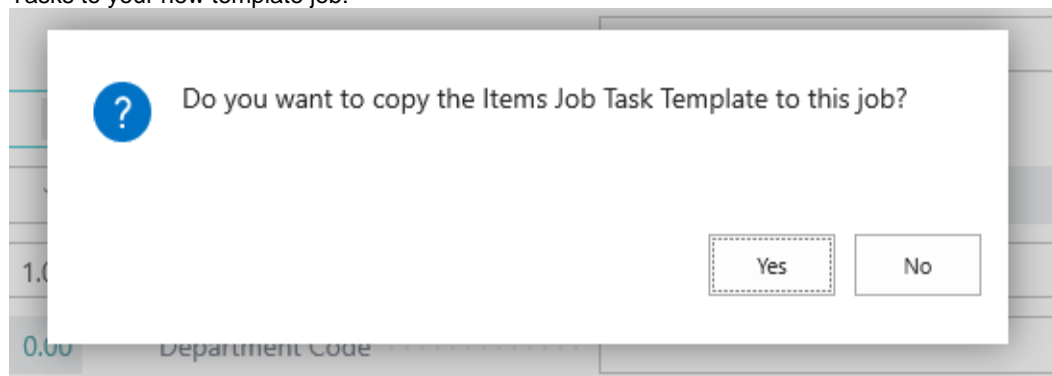
1047-01 · Templates for Jobs · 1047

Process	Report	Prices	WIP	Navigate	Job	Print/Send	Show Attached	Actions	Navigate	Report	Fewer options	
Bill-to Contact No.	C1000008			Customer PO No.								
Bill-to Name	The Cannon Group PLC			Blocked			▼					
Bill-to Address	192 Market Square			Last Date Modified			4/13/2020					
Bill-to Address 2				Project Manager			▼					
County												

Tasks	Manage	Line	Fewer options							
JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	PLANNED START DATE	START DATE	END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)		
1000	Begin Job	Begin-Total		—	—	—	—	—		
2000	Planning	Posting		1/28/2021	1/28/2021	80.00	—	—		
3000	Provide Service	Posting		1/28/2021	1/28/2021	501.20	—	—		
4000	Test Service	Posting		1/28/2021	1/28/2021	127.60	—	—		
5000	Billing	Posting		1/28/2021	1/28/2021	—	—	1,895.70		
9999	Total Job	End-Total		—	—	708.80	—	1,895.70		

Depending on your business, your second template job setup may be for a finished good item, or may be another project type job, with a larger set of tasks and planning lines. We will create a second template job for finished good item 70075.

If you have setup Item Tasks for your finished goods, the system will ask you if you want to copy the Item Tasks to your new template job:



If you say Yes, the system will populate the Job Task and Planning Lines with the information from the Item's Job Task Template. If the item does not have a template, you will manually enter the tasks and planning lines.

In this case, copied from the Item Task template, we have a few more tasks, and our planning lines contain only items necessary to produce this finished good:

Job Manager Core

Setup and Workflow Guide

← JOB CARD | WORK DATE: 1/28/2021

1047-02 · Templates for Jobs · 1047

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

Tasks Manage Line Fewer options

JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	PLANNED START DATE	START DATE	END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)
100000	Job	Begin-Total						
200000	Revenue	Begin-Total						
200001	Design Rev	Posting						
200002	Build Rev	Posting		1/28/2021	1/28/2021	1,438.51		
299999	Revenue Total	End-Total				1,438.51		
300000	Design	Begin-Total						
300001	Design Labour	Posting						
399999	Design Total	End-Total						
999999	Job Total	End-Total				1,438.51		

TEMPLATES FOR JOBS 200002 BUILD REV | WORK DATE: 1/28/2021 1047-02

✓ SAVED

Job Planning Lines

Search + New Edit List Delete Process Report Show Attached Open in Excel More options

JOB TASK NO.	LINE TYPE	PLANNING DATE	PLANNED DELIVERY DATE	DOCUMENT NO.	TYPE	NO.	DESCRIPTION	QUANTITY	FIX. CO.	EX. LINE	UNIT COST	TOTAL COST	UNIT PRICE	L AMO
200002	Budget	1/28/2021	1/28/2021		Item	1100	Front Wheel	2			259.342	518.68	2,000.00	2,000.00
200002	Budget	1/28/2021	1/28/2021		Item	1110	Rim	4			4.20	16.80	0.00	
200002	Budget	1/28/2021	1/28/2021		Item	1120	Spokes	12			24.00	288.00	0.00	
200002	Budget	1/28/2021	1/28/2021		Item	1150	Front Hub	1			12.441	12.44	500.00	500.00
200002	Budget	1/28/2021	1/28/2021		Item	1151	Axle Front Wheel	1			0.45	0.45	0.00	
200002	Budget	1/28/2021	1/28/2021		Item	1160	Tire	4			4.92	19.68	0.00	
200002	Budget	1/28/2021	1/28/2021		Item	1200	Back Wheel	2			259.363	518.73	2,400.00	2,400.00
200002	Budget	1/28/2021	1/28/2021		Item	1251	Axle Back Wheel	1			0.33	0.33	0.00	
200002	Budget	1/28/2021	1/28/2021		Item	1900	Frame	1			15.70	15.70	0.00	
200002	Budget	1/28/2021	1/28/2021		Item	70000	Side Panel	1			17.99576	18.00	30.70	30.70
200002	Budget	1/28/2021	1/28/2021		Item	70002	Top Panel	1			14.60	14.60	28.70	28.70
200002	Budget	1/28/2021	1/28/2021		Item	70003	Rear Panel	1			15.10001	15.10	29.60	29.60

Now that you have setup the template jobs you can use these templates to create new jobs. Enter a New Master Job and new sub job for a customer. Again, use the Create New Job function, saying yes to create a Master Job, and filling in the appropriate information. Then use the Create New Job function again, saying no to Create Master Job, and then choosing the Master Job to create the sub job for the new master.

For this first sub job, choose the Template Source "Project".

Then, choose the Action, Copy Job Tasks From so that we can copy the tasks from the previous project job.

You will see a window asking for some criteria for the job you want to copy from.

Job Manager Core

Setup and Workflow Guide

EDIT - COPY JOB TASKS

Copy from

Job No.	<input type="text"/>	Incl. Planning Line Type	Budget+Billable
Job Task No. from	<input type="text"/>	Incl. Ledger Entry Line Type	Usage+Sale
Job Task No. to	<input type="text"/>	Starting Date	<input type="text"/>
Source	Job Planning Lines	Ending Date	<input type="text"/>

Copy to

Job No. 1048-01

Apply >

OK Cancel

Here you will specify the Job Number that you want to copy from, as well as the tasks to copy and any other criteria.

EDIT - COPY JOB TASKS

Copy from

Job No.	1047-01	Incl. Planning Line Type	Budget+Billable
Job Task No. from	1000	Incl. Ledger Entry Line Type	Usage+Sale
Job Task No. to	9999	Starting Date	<input type="text"/>
Source	Job Planning Lines	Ending Date	<input type="text"/>

Copy to

Job No. 1048-01

Apply

Copy Quantity ☒ Copy Dimensions ☒

OK Cancel

In this case, we choose to copy from our previous 'Project' type job, copy all the tasks, all the planning lines. We have not set a new Start or End date so it will copy from the previous job, and we have chosen to copy the quantities and dimensions from the previous job as well. When the process is complete you will be notified that the job was copied:

Job Manager Core**Setup and Workflow Guide**

EDIT - COPY JOB TASKS

Copy from

Job No.	1047-01	Incl. Planning Line Type	Budget+Billable
Job Task No. from	1000	Incl. Ledger Entry Line Type ..	Usage+Sale
Job Task No. to	9999	Starting Date	
Source	Job Planning Lines	Ending Date	


Copy to

Job No. 1048-01

Apply

Copy Quantity

OK **Cancel**

 The job was successfully copied.

OK

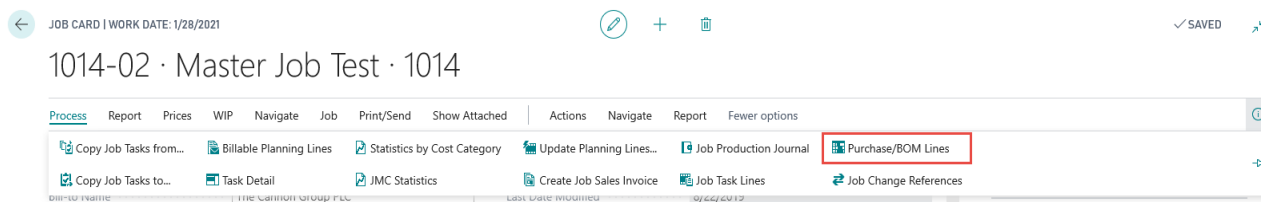
We can do the same with a second sub job – copying the job tasks and planning lines to a new sub job:
 You will enter the template source as Item and the Source No. as your item no, but choose NO to copy the item tasks. Then use the Copy Function to copy your tasks and planning lines from the previous job number. This allows you to have modified the tasks and planning lines for a job from the original item template without having to do it twice (or multiple times)

Posting Usage to a Job

Once the jobs have been created and are in process (open status) – then you will be posting usage (actual cost) to the jobs. As the job progresses, actual costs will get posted to the job in several ways: Purchase Orders can be created manually directly for the job, you can use time sheets for entering employee's time to jobs, or transfer material from your inventory to the job either from the planning lines, or Job Journal. The processes of entering actual costs are the same for all business models.

The manual purchase order process is the same as base Business Central processing. Job Manager Core adds functionality to the Job Planning Lines to make creation of Purchase Orders or posting item usage from inventory easier.

From the Job Card, there is a new view called "Purchase/BOM Lines"



This view allows a user to see all of the Budget lines (planning lines for items and resources to be used on the job). From this view, the user can use several options to post usage to the job, either by 'pushing' the items to the Requisition Worksheet (Create Requisitions) in order to create purchase orders, or by transferring inventory stock to the job journal and posting the usage.

Create Requisition allows the user to 'push' the items for the job to the Requisition Worksheet in order to create Purchase Orders. When the process is run, it populates the Requisition Worksheet for the selected lines, including quantities and the estimated cost. The Job Number and Task number are also brought to the worksheet, so that when the Purchase Order is created, it is tied to the job.

The "Autofill Qty to Requisition" action will populate the Quantity to Requisition field with the outstanding quantity of the planning lines. Or the user can choose to manually populate the Quantity to Requisition field if some items are inventory items, and some need to be ordered.

The screenshot shows the 'Auto Fill Qty. to Requisition' action selected in the top navigation bar. Below the navigation bar, there are several action buttons including 'Mark All for Stock Transfer', 'Stock Transfer --> Job Jnl', 'Open Job Journal', 'Auto Fill Qty. to Requisition' (highlighted with a red box), and 'Create Requisitions'. Below the buttons is a table with columns: SE... TO JO..., PLANNIN... DATE, JOB TASK NO., TYPE, NO., DESCRIPTION, QUANTITY, JTD USAGE QTY, OUTSTANDI... QTY, QTY TO REQUISITION, QTY ON REQUISITION, and COMMENT. The table contains several rows of data, with the 'QTY TO REQUISITION' column highlighted by a red box.

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"/>	1/28/2021	1200	Item	1100	Front Wheel	2	0.00	2.00	2.00	—	
<input type="checkbox"/>	1/28/2021	1200	Item	1160	Tire	4	0.00	4.00	4.00	—	
<input type="checkbox"/>	1/28/2021	1200	Item	1170	Tube	4	0.00	4.00	4.00	—	
<input type="checkbox"/>	1/28/2021	1200	Item	1200	Back Wheel	2	0.00	2.00	2.00	—	
<input type="checkbox"/>	1/28/2021	1200	Item	1310	Chain	10	0.00	10.00	10.00	—	
<input type="checkbox"/>	1/28/2021	1200	Item	1700	Brake	4	0.00	4.00	4.00	—	
<input type="checkbox"/>	1/28/2021	1200	Item	FG101JM	MTO Assembly Bike Part	2	0.00	2.00	—	—	

Once the planning lines have been populated with the Quantity to Requisition, then the "Create Requisitions" action can be carried out. Once items have been put in the Requisition Worksheet, the Qty. On Requisition field is updated, so that you can see from the planning lines that items have been moved to the Requisition Worksheet.

Job Manager Core

Setup and Workflow Guide

Search

Edit List

Process

Report

Show Attached

Open in Excel

Actions

Report

Fewer options

EDIT - JOB PLANNING PURCHASES - 1014-02 - MASTER JOB TEST - 1014

SE... TO JO...	PLANNIN... 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	UNI
<input type="checkbox"/>	1/28/2021	1200	Item	1100	Front Wheel	2	0.00	2.00		-		PCS		
<input type="checkbox"/>	1/28/2021	1200	Item	1160	Tire	4	0.00	4.00		4.00		PCS		
<input type="checkbox"/>	1/28/2021	1200	Item	1170	Tube	4	0.00	4.00		4.00		PCS		
<input type="checkbox"/>	1/28/2021	1200	Item	1200	Back Wheel	2	0.00	2.00		-		PCS		1.
<input type="checkbox"/>	1/28/2021	1200	Item	1310	Chain	10	0.00	10.00		10.00		PCS		
<input type="checkbox"/>	1/28/2021	1200	Item	1700	Brake	4	0.00	4.00		-		PCS		
<input type="checkbox"/>	1/28/2021	1200	Item	FG101JM	MTO Assembly Bike Part	2	0.00	2.00		-		PCS		

Close

From the Requisition Worksheet, Business Central process takes over, and the Purchase Orders are created from the inserted Planning lines.

←

REQUISITION WORKSHEETS | WORK DATE: 1/28/2021

✓ SAVED

Name

DEFAULT

...

Manage

Process

Report

Drop Shipment

Special Order

Line

Item Availability by

Actions

Navigate

Report

Fewer options

TYPE	NO.	ACTION MESSAGE	AC... AC... ME...	DESCRIPTION	LOCATION CODE	ORIGINAL QUANTITY	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST	ORIGINAL DUE DATE	
<div>Item</div>	1160	New	<input checked="" type="checkbox"/>	Tire			4	PCS	3.79148		
Item	1170	New	<input checked="" type="checkbox"/>	Tube			4	PCS	5.39438		
Item	1310	New	<input checked="" type="checkbox"/>	Chain			10	PCS	15.40725		
			<input type="checkbox"/>								

Item Details - Replenishment

Item No.

1160

Replenishment System

Purchase

PURCHASE

Vendor No.

01587796

Vendor Item No.

ADG-4577

PRODUCTION

Manufacturing Policy

Make-to-Stock

Routing No.

Production BOM No.

Once the PO has been created, the Planning lines will reflect information related to the Purchase Order as well.

Search

Edit List

Process

Report

Show Attached

Open in Excel

Actions

Report

Fewer options

EDIT - JOB PLANNING PURCHASES - 1014-02 - MASTER JOB TEST - 1014

SE... TO JO...

TOTAL COST (LCY)

UNIT PRICE (LCY)

DOCUME... DATE

LINE AMOUNT (LCY)

BUY-FROM VENDOR NO.

VENDOR ITEM NO.

BU... LINE

PLANNED DELIVERY DATE

QTY. TO TRANSFER TO JOURNAL

RESERVE

RESERVED QUANTITY

QTY. ON P.O.

P.O. NUMBER

OUTSTANDING QTY TO RECEIVE

QTY. RECEIVED

EXPECTED DATE

<input type="checkbox"/>	259.34	1,000.00	1/28/2021	2,000.00	20000		<input checked="" type="checkbox"/>	1/28/2021	1	Never	0	-	-	-	-	-
<input type="checkbox"/>	9.84	0.00	1/28/2021	0.00	01587796	ADG-4577	<input checked="" type="checkbox"/>	1/28/2021	2	Never	0	4.00	106040	4.00	-	1/28/2021
<input type="checkbox"/>	14.00	0.00	1/28/2021	0.00	01587796	GG-78827	<input checked="" type="checkbox"/>	1/28/2021	2	Never	0	4.00	106040	4.00	-	1/28/2021
<input type="checkbox"/>	259.36	1,200.00	1/28/2021	2,400.00			<input checked="" type="checkbox"/>	1/28/2021	1	Never	0	-	-	-	-	-
<input type="checkbox"/>	99.50	0.00	1/28/2021	0.00	32456123	HH-45888	<input checked="" type="checkbox"/>	1/28/2021	5	Never	0	10.00	106041	10.00	-	1/28/2021
<input type="checkbox"/>	78.12	1,200.00	1/28/2021	4,800.00			<input checked="" type="checkbox"/>	1/28/2021	2	Never	0	-	-	-	-	-
<input type="checkbox"/>	0.00	0.00	1/28/2021	0.00			<input checked="" type="checkbox"/>	1/28/2021	1	Never	0	-	-	-	-	-

Close

You can also view the PO amounts from the Job Manager Core Statistics on the Job Card.

←

JOB CARD | WORK DATE: 1/28/2021

+

✓ SAVED

1014-02 · Master Job Test · 1014

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.

1014-02

IS MASTER JOB

Job Manager Core

Setup and Workflow Guide

← JMC JOB STATISTICS | WORK DATE: 1/28/2021

1014-02 · Master Job Test · 1014

Process Report Show Attached More options

	CURR. BUDGET	PO OUTSTANDING AMOUNT	PO REC'D NOT INVOICED	ACTUALS	VARIANCE	PERCENT COMPLETE
Billable Amount	1,600.00			1,000.00	600.00	63%
Labor Hours	4.00			0.00	4.00	0%
Field Labor Hours	0.00			0.00	0.00	0%
Machine Hours	1.00			0.00	1.00	0%
Labor Cost	127.60			0.00	127.60	0%
Field Labor Cost	0.00			0.00	0.00	0%
Machine Cost	0.00			0.00	0.00	0%
Material Cost	720.16	123.34	0.00	0.00	720.16	0%
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 Processing	0.00	0.00	0.00	0.00	0.00	0%
Overhead	0.00	0.00	0.00	0.00	0.00	0%
Miscellaneous	0.00			0.00	0.00	0%
Transport	0.00	0.00	0.00	0.00	0.00	0%
Totals	847.76	123.34	0.00	0.00	847.76	0.00
Profit Amount	752.24			1,000.00		
Profit Percent	47.02			100.00		
Job Qty Ordered						

Other usage posting is handled in the Job Journal with the standard Business Central processes.

Work in Process (WIP)

Work in Process (WIP) is Part of Microsoft Dynamics 365 Business Central's Job Granule. It is NOT part of Job Manager Core. It will not be covered here.

If your "Jobs" are long in duration, then you may want to move the Direct Expenses from the P&L Statement to the Balance Sheet until the revenue is realized.

Not all companies will utilize this accounting technique, please consult with your Tax Advisor. Microsoft Dynamics 365 Business Central supports 5 WIP methods.