Job Manager Core: Setup and Workflow Guide

Setup and workflow guide for the Job Manager Core module for
Microsoft Dynamics 365 Business Central.

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V1.00, 04/08/2020

Index

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

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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

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.

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.

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.

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

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

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	_	_	☑	☐	☐
M-FIRMP-M	Production Order(Firm Planned)	1010001	1011999	1/31/2021	1010006	☑	☐	☐
MJOB	Master Jobs	1000	_	1/28/2021	1040	☑	☑	☐
M-PLAN	Planned orders	101001	102999	1/28/2021	101001	☑	☐	☐
M-PLAN-M	Production Order(Planned)	109001	1010999	1/31/2021	109001	☑	☐	☐
M-QUO	Sales Quote	1001	2999	_	_	☑	☐	☐
M-REL	Released orders	101001	102999	1/1/2020	101003	☑	☐	☐

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

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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.

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

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

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
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...	(off)
Income/Balance	Income Statement	Automatic Ext. Texts	(off)
Account Category	Cost of Goods Sold	Direct Posting	(on)
Account Subcategory		Blocked	(off)
Debit/Credit	Both	Last Date Modified	
Account Type	Posting	Omit Default Descr. ...	(off)
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 wan 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.

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

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

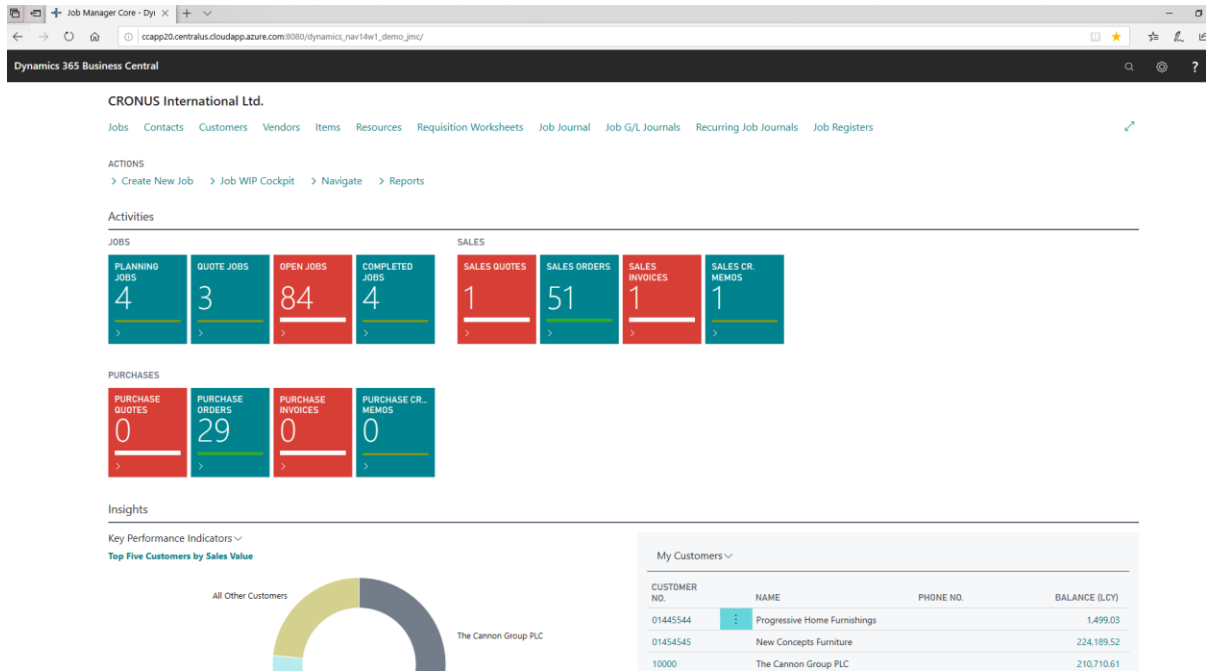| Role Center | Job Manager Core | ... |
| Company | CRONUS International Ltd. | ... |
| Work Date | 1/28/2021 | × 🗓 |

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.

OK   Cancel

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

6. Sets up the Jobs Setup, if not populated

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

8. Creates a Template Master Job Automatically

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.

10. Creates new template sub jobs

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11. Setup sample Tasks on the Sub Job

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.

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.

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   ↗

🔍 Search   + New   📝 Edit List   🗑 Delete   Show Attached   📊 Open in Excel   ▽   ☰

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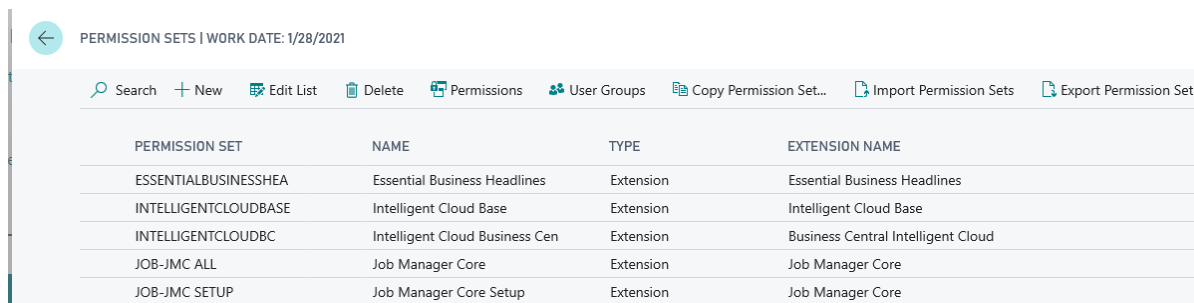
ACTIONS
> Create New Job   > Job WIP Cockpit   > Navigate   > Reports

Activities

JOBS
PLANNING JOBS	QUOTE JOBS	OPEN JOBS	COMPLETED JOBS
4	3	84	4

SALES
SALES QUOTES	SALES ORDERS	SALES INVOICES	SALES CR. MEMOS
1	51	1	1

PURCHASES
PURCHASE QUOTES	PURCHASE ORDERS	PURCHASE INVOICES	PURCHASE CR. MEMOS
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.

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

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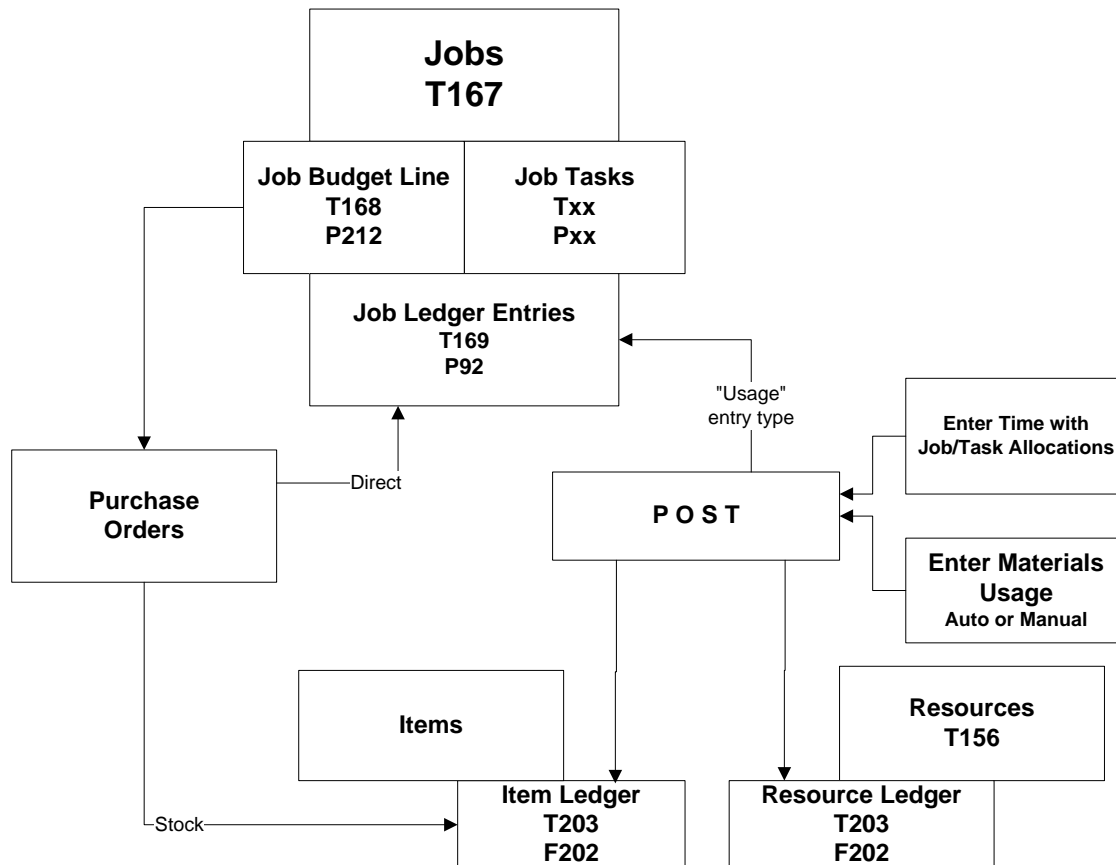
There are a few additional tasks to consider as part of the setup for Job Manager Core. Once these processes are complete, we will review the workflow.

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.

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 that the new account numbers that were set up for the cost categories are indented within the Begin and End Planning Line Accounts.

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

4. 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.

5. Your chart of accounts and account schedules, inventory items, vendors and customers.

6. The posting groups for Customer, Vendor, Item, Job

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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.

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.

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NO.	DESCRIPTION	TEMPLATE SOURCE	SOURCE NO.	STARTING DATE	STATUS ▼	ENDING DATE	BILL-TO CUSTOMER NO.
1021	Computer Display & Sidebao...	Project			Open		019058!
999		Project			Open		019058!
0100	Template for Gorrie demo	Project			Planning		019058!
1025		Project			Open		
1026	Master Job Test	Project			Planning		10000
1029	Test Job Actions	Item			Open		10000
1030		Project			Open		014545<
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		014545<
1039 20200331	TEST 1 ON MAR 31, 2020	Project			Open		014545<
1040		Project			Planning		014545<
1041	Master job	Project			Open		014545<
1042		Project			Open		014545<
1043		Project			Open		014545<
1044		Project			Open		
1047	Templates for Jobs	Project			Open		

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.

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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:

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.

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

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.

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.

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:

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JOB CARD | WORK DATE: 1/28/2021

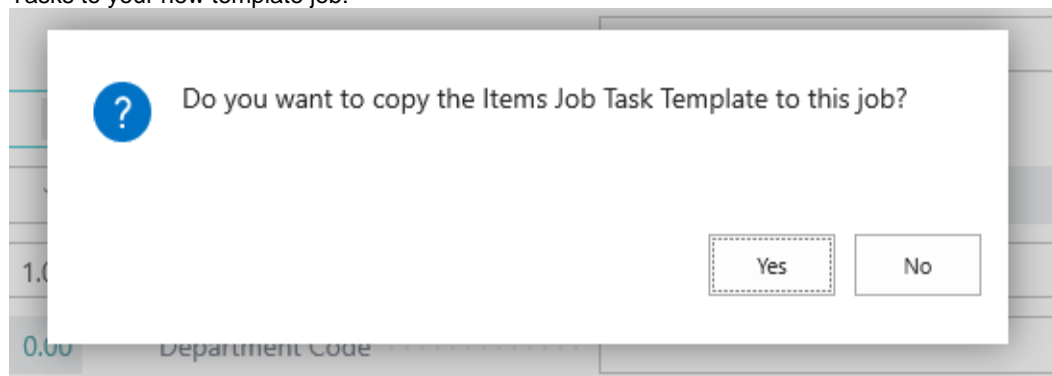# 1047·02 · Templates for Jobs · 1047

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	1/28/2021	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	PLANNIN... DATE	PLANNED DELIVERY DATE	DOCUME... NO.	TYPE	NO.	DESCRIPTION	QUANTITY	FIX... CO...	EX... LINE	UNIT COST	TOTAL COST	UNIT PRICE	L AMOU
200002	Budget	1/28/2021	1/28/2021		Item	1100	Front Wheel	2	☐	☐	259.342	518.68	2,000.00	2,000
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
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
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
200002	Budget	1/28/2021	1/28/2021		Item	70002	Top Panel	1	☐	☐	14.60	14.60	28.70	2
200002	Budget	1/28/2021	1/28/2021		Item	70003	Rear Panel	1	☐	☐	15.10001	15.10	29.60	2

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.

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

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:

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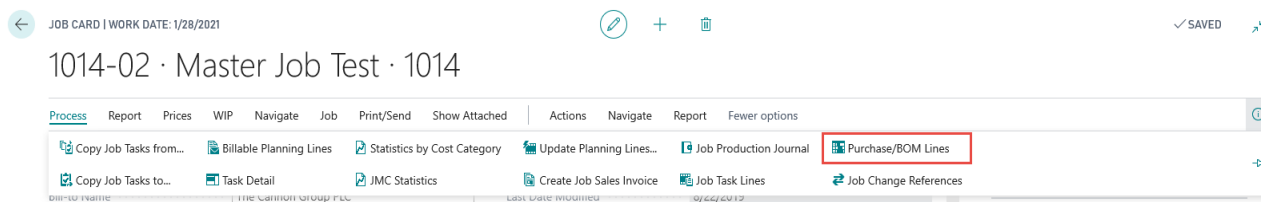
This view allows a user to see all of the Budget lines (planning lines for items and resources to be used on the job) From this view, the user can use several options to post usage to the job, either by 'pushing' the items to the Requisition Worksheet (Create Requisitions) in order to create purchase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

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.

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

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

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

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← JMC JOB STATISTICS | WORK DATE: 1/28/2021   ✎   +   🗑   ⤢

1014-02 · Master Job Test · 1014

Process   Report   Show Attached   More options

	CURR. BUDGET	PO OUTSTANDNG AMOUNT	PO RECV'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	3.00			3.00		

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.