Job Manager Core

For Microsoft Dynamics 365 Business Central [Essentials or Premium]

A complete activity based costing solution for accurate Job Costing

Job Costing with Control

Ideal for any company that wants to calculate Job Profitability. Job Oriented companies are providing a personalized service, and the service needs to be "costed" in detail. Get the control you always wanted. Revenue - Cost = Profit. You will see your Job to Date Revenue, Costs, and Profit in real time.

You can create "Projects" by Grouping Jobs. (Master Jobs and Sub Jobs) Job Manager Core is specifically designed to enhance Dynamics 365 Business Central's Job Granule.

If you have quick turns or long duration jobs; Labor Cost, Subcontractors, and Material Costs are instantly displayed. All of these costs, and often more, make up the total cost of your job.

Master Jobs with Sub-Jobs

1007-01Conveyor Template10000The Cannon Group1007-02Service/Repair Job (3)10000The Cannon Group1014Master Job to Group Sub-Jobs10000The Cannon Group1014-01Base Job/Billing Job10000The Cannon Group1014-02Conveyor Job10000The Cannon Group1014-03Test Job Copy of Conveyor - OK30000John Haddock Insu	l i		1		
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1014-05 New Subjob test for task 10000 The Cannon Group	Оре	The Cannon Group PLC	10000	New Subjob test for task	1014-05



Beneficial for:

- Aerospace & Defense
- Heat Treating
- Industrial Equipment Mfg.
- Service Business
- Job Shops
- Oil & Gas Industry
- Metal Fabrication
- Energy Industry
- Remanufacturing
- Repair Shops
- Research & Development
- Conveyor Mfg.
- Subcontractors



Key Features

I reduced my month end closing process to 3 days from 20 days. ??

Estimating and Quoting

- Estimator's Worksheet detailed calculations
- Copy a Template Job for next job setup
- Task Details and Planning Lines show Estimate
- Set your Budget Billing Amounts in seconds

Procurement

- Demand based purchasing
- Buy direct to Jobs
- Subcontract and outside processing
- Open PO commitments on Job Stats
- Add Material Requirements on the Fly

Labor Tracking

- Time collection with optional "Job Time
- Entry" Granule.
- Per Employee or Foreman Entered
- Scanner Interface or Web Browser for remote Time Entry

Billing

- Milestone, Percentage of Completion, T&M and Fixed Fee
- You can edit the Invoice Design

Work in Process (WIP)

Auto-post WIP

- Auto-post Recognition
- Audit Trail of every entry
 Optional: GL to Job WIP Recognition Report

		Jop (Jaru			
		Edit - Job Card - 10	14-02 - Conveyor Job			_
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				¢**	Job budget	1
No.:	1014-102	ZIP Code:	31772 *		No.: Planned Billable Amt	15
Description	Conveyor Job	Country/Region Code:	US v		Labor Hours	
Bill-to Customer No.:	10000 v	Contact:	Mr. Andy Teal		Labor Cost: Material Cost:	2
Bill-to Contact No.:	CT000008 v	Search Description:	CONVEYOR JOB		Material Cost: Misc Cost:	
Name	The Cannon Group PLC	Is Master Jobr			Total Est. Cost:	2
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State / ZIP Code:	GA	Last Date Modified:	1/19/2019		Invoiced Amount: Labor Hours:	1
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losting				÷* *	Job Details	
Status:	Open v	Allow Budget/Billable Lines	×		Job No.:	1
Job Posting Group:	SETTING UP	Apply Usage Link	×		Budget Cost Resource:	2
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WP Posting Method:	Per Job	% Invoiced:	3421		G/L Account:	
		% of Overdue Planning Lines:	14.29		Total	2.6
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1014-02 - Conveyor Job Cost Variance Cur. Budget P0 Outstanding Amount P0 Recvi Not Invoiced Actualis Variance Precent Complete Bitable Ame 13200000 32000 1000 0% Labor Hours: 32000 1000 0% 1000 0% Labor Hours: 32000 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000 0% 1000

Job Statistics

- Bar Code Scanning
 - Employee Time Entry
 - **Capacity Planning**
 - Audit Trail of Costs



- Gerri McGighan-Lukens (Classic Fire)

Business Benefits

Track Your Tasks:

Job Task No.	Description
1000	Begin Job
1100	Revenue/Contracts
1200	Revenue
1300	Contacts/Milestones
1900	Total Revenue
2000	Pre-Production
2100	Client Meetings
2200	Engineering/CAD
2300	Internal Meetings
2400	Design
2900	Total Pre-Production
3000	Production
3100	Cutting
3200	Machining
3300	Welding
3400	Painting
3500	Assembly
3600	Final Inspection
3900	Total Production
4000	On-Site Division
4100	Site Prep
4200	Installation
4300	Training
4400	Insurance
4500	Contingency
4600	Sign-Off Meeting
4900	Total On-Site Division
9999	Job Totals

1 Increase revenue with shorter lead times & reliable promise dates that allow for better deliveries & customer service.

2. Cut costs by significantly reducing inventories, overtime, expediting fees and time spent updating spreadsheets.

Keep informed with real time data. Know where your costs are on every job, every minute of the day.

Gain Contro through instant access to the Audit of all costs posted to each task on your Job Task List. (See sample)

5. **Save time** with quick and easy access to your company's Projected Cost at Completion. Solve problems before they happen.



Estimating



Profitability Analysis

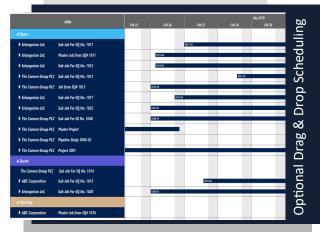


Employee Time Entry



Does this sound like you?

		Job Qty Ordered	1.00				6		-	
Job No. : 1006-0		Job Project No.	мото	R			RE	A CONTRACT	F	
Motor -Design/Build Master Job from SC	l/Install 0# 1006						AVE	and and a		þ
Status Orr Responsible PS Quote No. Sales Order No.	ler	Customer 30000	John Hadd	ock Insurar	we Co.					lahor Tracking
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220	Design			20.000	0.000	07/02/09	07/07/09			
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Job Planning L	ine Details							L		
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I need to know if our estimates are accurate. Budget VS Actual Costs

- We need to know what percentcomplete we are on each job.
- We want to reduce the high carrycost of our inventory. Stocking Levels
- When we get an analysis of a project,it's too late to fix problems. Real Time
- We are collecting data, but everyonehas their own spreadsheet. Re-Entry
- 6. We need access to historical data to quote new jobs. Job History
 - We want to allocate employee timeto specific work activities. Self Service

Click Here to Request a Quote



Job Manager Core Key Features List

"Job Manager Core" Key Features:

- 1. New Role Center designed specifically for the Job Costing Users
- 2. Create "Projects" by Grouping Jobs (Master Job and Sub-Jobs)
- 3. Task Details List with Split View to the Job Planning Line Details
- 4. Unlimited User Defined Cost Categories within 9 Cost Category Groups
- 5. New easy to read Job Cost Statistics (Our most viewed Page)
- 6. "Change Job Status to Complete" now checks for Open Sales Invoices and Purchase Orders
- 7. 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.
- 10. Job Manager Core Setup Screen has "Quick Start" Option to Generate: Item Master Cost Categories, Resource Cost Categories, Master Job Number Series, Bonus Chart of Accounts, and more.
- 11.Resource Ledger Entries has been enhanced to include the Job Task Number and Cost Category
- 12. Material Consumption Options: Forward, Backward, or Manual
- 13. Committed Cost shows at the Job Level and the Task Level too
- 14. Percent Complete by Cost or Hours shows at the Job Level and the Task Level
- 15. Projected Cost at Completion can be based on Field Reporting of Percent Complete
- 16.New Cost Category Statistics Page
- 17. Requisition Worksheet enhanced with Job Task Number. Carries to PO on "Carry Out" action.



Job Manager Core Key Features List

"Job Manager Core" Key Features:

18. 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. This enables you to select the line items you want to bill and tracts the actual Posted Sales Invoices on the line.

19. New option on Job Card to assign or re-assign that Job to a different Master Job.

(All Supporting Tables are adjusted as well.)

20. Option to Globally update Planning Line Start Dates. Ideal after a Copy Tasks from an older Job.

21. Enabled Purchasing from the Master Job level, and maintain Job/Task level details for PO Lines.

22. New utility to change the Planning Line Start Dates and Quantities. Added new function to Update Planning Line's Quantity by a Quantity Factor or reset the Planning Line's Planning Date. Ideal for adjusting a Job that had a delayed start date.

23. New Job Summary Statistics Fact Box for the Job List and Job Card.

24. Change Order Management

- Planning Line Change Tracking

Purchase Order Line Change Tracking

25. Percent Complete and Percent Invoiced. Added both values to Summarized Fact Box. And it works for the Master Job Statistics too.

26. Simple Task Start Date Entry with optional Planning Line Updates too.

27. Full Item Production: Information Fields or produce to Item Card's Qty on Hand. Optional Assembly Template copied to new Jobs.

28. Import Planning Line Data. From CAD or 3rd Party. Mapping adjustments req.

29. Your suggestions are always welcome.



Designed For: Microsoft Dynamics 365 Business Central Works with: Essentials OR Premium Editions On-Premise Edition now, AppSource in the fall of 2019.	Base Jobs	Job Manager Core
ACCESS TO INFORMATION		
Project Management Role Center	Y	Y
Job Manager – more complete access to information		Y
More informational factboxes		Y
More robust statistics pages		Y
More efficient accesses to Job Planning Lines		Y
Task & Associated Planning lines view on split screen		Y
SORTING & GROUPING OF JOB COST INFORMATION		
Jobs	Y	Y
Group Jobs under a Master Job		Y
Job Statistics	Y	Y
Master Job Statistics – rolls up sub job statistics		Y
Tasks and Task groups	Y	Y
Statistics by Transaction Type: Item, Resource & G/L Account	Y	Y
Statistics by Cost Type Groups: Shop Labor, Field Labor, Machine, Material, Sub Contractors, Expense, Service, Transport, Overhead,		Y
Identify Job by Description field	Y	Y
Identify a Job Type: Project or Item		Y
Identify a specific Job Type Code: Project No. or Item No.		Y
Identify if Job represents a Quantity greater then (1)		Y
Statistics shows Est. to Actual Cost variances	Y	Y
Displays a variance and % complete by Cost Type		Y
Displays Est. and Actual Profitability	Y	Y
Statistics easier to read and understand		Y
Statistics shows committed costs on Purchase Orders		Y
Displays Est. and Actual Cost Each		Y



Designed For: Microsoft Dynamics 365 Business Central Works with	: Base Jobs	Job Manager
Essentials OR Premium Editions		Core
On-Premise Edition now, AppSource in the fall of 2019.		

GROUP COSTS BY COST CATEGORIES (Labor, Material)	
10 Cost groups	Y
Tasks can be sequential job activities vs. cost buckets	Y
User defined cost categories	Y
All transaction types can be set to any Cost Category	Y
Cost Category statistics	Y

JOB COST PROJECTIONS	
Allow entry of % of completion by Cost Category Grp	Y
See Projected Cost on Job Statistics	Y

JOB COST CHANGE TRACKING		
Job FactBox to show Original Budget costs	Y	Y
Saves the Original Budget		Y
Job Factbox to show Original, Billable & Non-Billable changes in budgeted costs		Y
Factbox on Tasks to show Original, Billable & Non- Billable Changes per task		Y
Allow for multiple changes to be identified		Y
Changes can be identified by a Change Reference No.		Y
Drill down on original budget separate before change		Y
Factbox change information drills down to PO line		Y
See more below on tracking Purchase Order changes		Y



Designed For: Microsoft Dynamics 365 Business Central Works with:	Base Jobs	Job Manager
Essentials OR Premium Editions		Core
On-Premise Edition now, AppSource in the fall of 2019.		

PURCHASING		
Purchasing for Stock includes Job Planning Lines	Y	Y
Allow Requisition Worksheet to do Purchasing to Jobs		Y
Purchases\BOM page displays purchasable planning lines		Y
What to Purchase control on Planning lines		Y
Carry out Action on Req. Worksheet creates Job PO		Y
PO change tracking show on Job PO Change FactBox		Y
PO changes show at the task level too.		Y
Purchasing at the Master Job level too.		Y
Show Committed Purchase Amounts on Job Statistics		Y
Show Purchase information on Planning lines too		Y
All Purchase information is drillable to PO lines		Y

BILLING		
Show Job billing on Sales Orders		
Show Job billing on Sales Invoices	Y	Y
Enter multiple Billable Planning Lines per Job & Task	Y	Y
View billable planning lines at Job Task Level	Y	Y
View all billable planning lines for the job		Y
View all billable planning lines for all sub jobs for a Master Job.		Y
Allow an invoice to bill multiple jobs is same bill-to		Y
% of Completion, Milestone, Item, & Service Billing	Y	Y
Revenue recorded to the Job as a Sale Job Ledger	Y	Y
Serial\Lot No. Inventory Sales Item tracking with Jobs		
Serial\Lot No. Entry on Billable Planning Lines		Y
Serial\Lot No. show on Sale Type Job Ledger Entry		Y



Designed For: Microsoft Dynamics 365 Business Central Works with: Essentials OR Premium Editions On-Premise Edition now, AppSource in the fall of 2019.	Base Jobs	Job Manager Core
CREATE JOB		
Create Job	Y	
Create Master Job (Project)		Y
Create Sub Job linked to a Master Job		Y
Get default field values from Jobs Setup	Y	Y
Additional default field values from a Master Job		Y
"Copy Job" to startup Tasks and Planning Lines	Y	Y
Startup Job with tasks and BOM from an Item		Y
Startup Job with tasks and BOM from a Resource		
Manual updating planning lines dates and costs	Y	Y
Setup and Run time to assist Begin and Finish dates		
on Tasks – assisted planning date on Planning lines		
Fast Update Planning costs with a "times" cost factor		Y
Option to multiply costs by a Quantity on the Job		Y
Sub job to Sub job linking		

PLANNING DATE CONTROLS		
Manual entry of planning dates	Y	Y
Update planning dates based on the Task Start		
Planning Date		Y
Batch Update all planning line dates	Y	Y
Faster facility to update planning dates		Y
Update planning dates based on Task total est. time		

SERIAL NO. & LOT NO. TRACKING		
Inventory Sales Item tracking with Jobs		
Serial No. & Lot No. Entry on Billable Planning Lines		Y
Show Serial\Lot No. on Sale Type Job Ledger Entries		Y
Job Journal Usage Posting to Jobs w\Item Tracking	Y	Y
PO Posting to Jobs w\Item Tracking	Y	Y

IMPORT TO PLANNING LINES		
Build your own Rapid Start Packages	Y	Y
Import planning lines action on Job		Y



Designed For: Microsoft Dynamics 365 Business Central Works with:	Base Jobs	Job Manager
Essentials OR Premium Editions		Core
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POSTING PRODUCTION OF AN INVENTORY ITEM		
Posting Production in a Job Production Journal		
Posting Production as Positive Entry in Item Journal	Y	Y
Tracking of Job Qty. Produced on Job Card		Y
Sale of Stock inventory item recorded to Job from a		
Sales order, Return Order or Credit Memo		Y
Sale of stock item from SO shows on Item Ledger and		
Job Ledger (entered Production Job No.)		Y
Sale of Stock w\Production Job No. allows use of		
Warehouse Management		Y

BILL OF MATERIALS		
Job Planning lines copied from previous job	Y	Y
Easily identify what job produced & item or project #		Y
Copy Bill of Materials from Item Assembly BOM		Y
Create an Item's Assembly BOM by coping another		Y
Mass replace a component on an Assembly BOM		Y

SCHEDULING		
Optional – Netronic Visual Job Scheduler -Gantts	Y	Y

SAFETY GUIDANCE WHEN COMPLETING & DELETE JOBS		
Checks for Job's outstanding POs		Y
Checks for Job's outstanding Sales Lines		Y
Checks for Job's outstanding job journal entries		Y
Checks for Job links to open transactions when delete		Y
AUTO START USING THE JOBS SYSTEM		
Manual setup of Jobs Setup, and Job Posting Groups	Y	Y
Auto setup of Jobs Setup, Adv Setup, & Posting Grps		Y
Manual setup of Job templates with tasks	Y	Y
Auto setup of Job Templates with tasks		Y
Resource Card and Item Card Task Templates		
Create Job then use Copy Task from Template Job(s)		Y

WIP ACCOUNTING		
Five WIP Method (Provided in base BC)	Y	Y



Designed For: Microsoft Dynamics 365 Business Central Works with:	Base Jobs	Job Manager
Essentials OR Premium Editions		Core
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REPORTS		
Basic BC Job Cost Reports Included	Y	Y
9 Extended Reports		Y

HOW DELIVERED		
Database	Y	
FOBs		Y
Extension (NAV 2018, BC On-Prem)		Y
HOW PRICED		
Per Database		Y
Per User Per Month		Y
Call office to Request a Quote		
Supports the Following Businesses		
Long Duration Service type businesses	Y	Y
Project Type businesses	Y	Y
Long Duration \ Complex Equip. Mfg – No Item Nos	Y	Y
Long Duration \ Complex Equip. Mfg – Need Item Nos		Y
Engineered to Order Custom Products- No Item Nos	Y	Y
Engineered to Order Custom Products- Need Item Nos		Y
Make to Order Products by changes made to basic BOM		Y
Serial\Lot Nos on Products when sold		Y
Full item tracking – Requires posting Item No. to Stock		Y



Job Manager Core Business Models

Processes used in Job Manager Core	Service	Engineered to Order	Make to Order	Make to Stock
GENERAL PROFILE:				
Large\Long Duration Projects – Not making a Product	Y			
Large or Complex Products – Long duration		Y	Y	Y
Projects and Products are Unique to the Customer	Y	Y	Y	Y
Costing Culture – detailed task list	Y	Y	Y	Y
Estimates and Quotes are detailed	Y	Y	Y	Y
Allocate Actual Cost by Cost Code or Cost Categories: Shop Labor, Field Labor, Machine time, Material, & others	Y	Y	Y	Y
Look at Time cards – Should be recording time to Job, Job Task and Cost Category Need the visibility of Estimated Costs to Actual to monitor	Y	Y	Y	Y
and manage the Job	Y	Y	Y	Y
Want to know the profitability of the Job. Revenue less Cost = Profit	Y	Y	Y	Y
If Quantity is a factor on the Job, then the Quantities are typically 1 to 10.	Y	Y	Y	Y
METHODS USED TO SETUP JOB:				
No Item Number needed	Y			
Project is making a Large or Complex Product but is not assigned an Item number		Y		
An Item Number is created, typically a custom product number for a customer.			Y	Y
Use Copy Job Tasks from another similar Job to start new job, then edit the new jobs planning line for how it is unique.	Y	Y	Y	Y
Use Copy Job Tasks from a "template" job and then import an external file to create the job's planning lines	Y	Y	Y	Y
Bill of Material is not stored with Item, because it is so unique, the BOM is determined as part of the Job.	Y	Y		
Bill of Materials are stored with the Item, and New items are created by coping the BOM of another item and editing the new items BOM – then Jobs are created to make the new item.			Y	Y
Option to Copy the Item's BOM to startup the Job			Y	Y
Allow Editing the Job's Tasks and Planning line for what is unique about the job.	Y	Y	Y	Y



Job Manager Core Business Models

Processes used in Job Manager Core	Service	Engineered to Order	Make to Order	Make to Stock
				T
METHODS USED TO SETUP JOBS CONTINUED				
Finished Good Items (FG) are never posted as qty on hand		Y	Y	
Show FG Item Serial & Lot Nos on the Job's billable				
planning lines		Y	Y	
Items are posted to inventory as quantity on hand (QOH)				Y
Use the Inventory's system of Item tracking for Serial and Lot Nos.				Y
Can enter a quantity on the job – provides a cost each		Y	Y	Y
Can multiply the costs by a factor to increase costs		Y	Y	Y
Would allow using the system's Warehouse Management				Y
METHODS USED TO RECORD ACTUAL COSTS:				
Enter all cost types via posting Job Journal Entries	Y	Y	Y	Y
Purchase items on POs direct to the job	Y	Y	Y	Y
Do not need item numbers to record material costs				
(use G/L Account – tagged as Material Cost Category)	Y	Y	Y	Y
Use Time sheets to record time	Y	Y	Y	Y
Use Item Journal to post Quantity on Hand				Y
Scanning employees time available via another App	Y	Y	Y	Y
METHODS USED TO INVOICE:				
Use G/L Sales & Deposit Accounts from the Job	Y	Y	Y	
Use the Job billable Planning lines to setup milestone				1
billing. Invoice from the Job using G/L Accounts	Y	Y		
Use Job WIP to determine progress billing – percentage of				
completion. Invoice from the Job using G/L Accounts	Y	Y		
Items are billed by making a Type Item billable Job				
Planning line. Record Serial\Lot Nos on Job Planning Line			Y	
Job based invoicing via billable planning lines, posts to the	V	Y	Y	
job ledger and show profitability on the job. Invoice from a Sales Order. Posting the Sales Order	Y	T	ſ	
shipped with reduce the Quantity on Hand.				Y
Shipment documents				Y
Can use system's warehouse management				Y
Posting Sales Order with the Production Job No. will post				1
to the job ledger and shows Job's profitability.				Y



Job Manager Core

For Microsoft Dynamics 365 Business Central

Granule ID: 14,190,800

Job Manager Core Software Prices

Let us know what Version of Dynamics 365 Business Central you are using and we can produce a Formal Quote for Management.

Our Quotes will include Software, Annual Maintenance, and an estimate for Installation, Configuration, and End-User Training. Our current Labor Rate is \$185/hr

Price

SaaS: \$12 per user/month

On-Prem: Company License =

\$5,500 + 16% M

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We encourage you to engage us so you fully utilize your Add-on Software. When you are ready to upgrade to a newer version call on us for that service too.

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