



prodware^P

PROJECT MANAGEMENT USER GUIDE

For Dynamics 365 Business Central



FRANCE | GERMANY | UK | BELGIUM | LUXEMBOURG | NETHERLANDS |
AUSTRIA | SPAIN | ISRAEL | MOROCCO | GEORGIA | CZECH REPUBLIC | US

VERSION HISTORY

Version history

Version	Date	Change log	Author
V0.1	31-03-2021	First draft	Jeroen van der Wijst
V1.0	23-06-2021	Added Project Template, Attributes, Invoice Template, Sell-to Customer	Jeroen van der Wijst
V1.1	08-07-2021	Added Combined Invoices	Jeroen van der Wijst
V1.2	14-07-2021	Added Departments	Jeroen van der Wijst
V1.3	20-07-2021	Added Financial allocations	Jeroen van der Wijst
V1.4	23-07-2021	Added Fixed Assets	Jeroen van der Wijst
V1.5	28-07-2021	Added Date Filter	Jeroen van der Wijst
V1.6	11-08-2021	Added Suite Registration	Jeroen van der Wijst

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This user document is valid for the Distribution Solution (Base version) *version 3.0* based on Microsoft Dynamics 365 Business Central.

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1. GENERAL INFORMATION

1.1 Goal of solution

The Jobs functionality in Dynamics 365 Business Central is a powerful tool to manage projects and contracts for your organization. This functionality enables users to define project structures (WBS), plan and manage tasks in projects, purchase or manufacture items for a project and manage budgets vs. actuals for a project. Additionally, delivered work (including time registration), services or products can be invoiced to customers for a project. The Prodware Project Management apps increase flexibility, efficiency and adds insights to the Jobs functionality in Dynamics 365 Business Central. The added functionality of the module empowers users managing projects or contracts to reduce repetitive actions and to standardize projects in an organization, saving time and reducing errors.

1.2 Solution Description

The Prodware Project Management suite for Business Central contains the following functions:

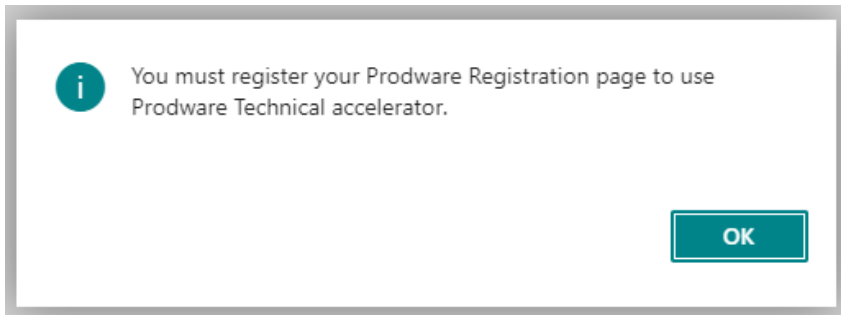
- Project Templates
- Attributes
- Invoice Templates
- Combined Invoices
- Departments
- Financial Allocation
- Date filter
- Fixed Assets

1.3 First Launch

Important: All following actions that are needed to register to Prodware license system must be done using administrator level access. Connect to your Business Central system using a login with all necessary permissions (SUPER).

1.3.1 Registration to the Prodware License system

The first time you use some functionalities of this accelerator you may encounter a message like this one:

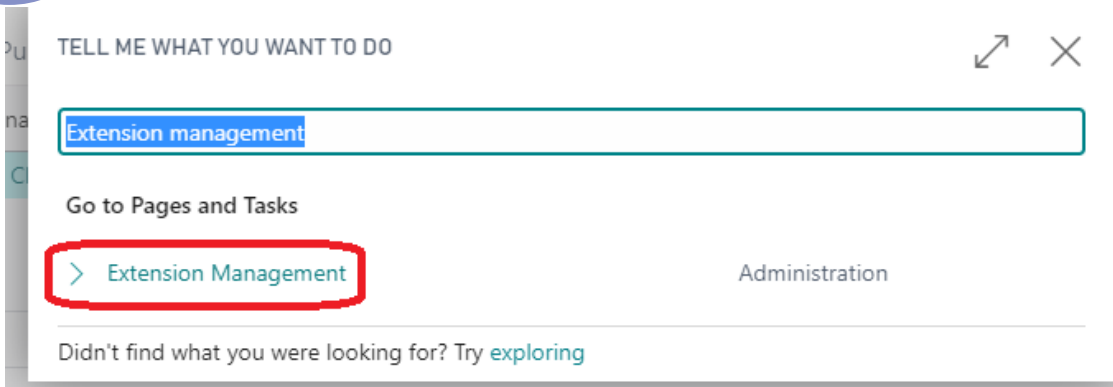


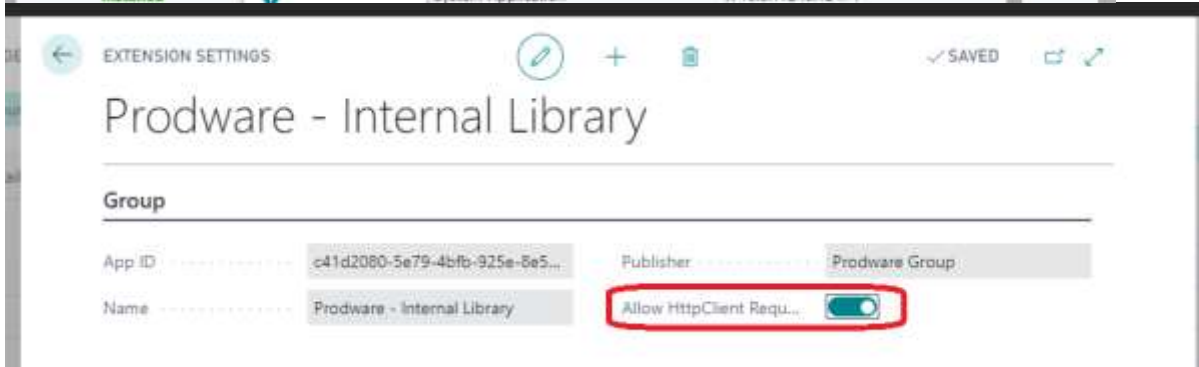
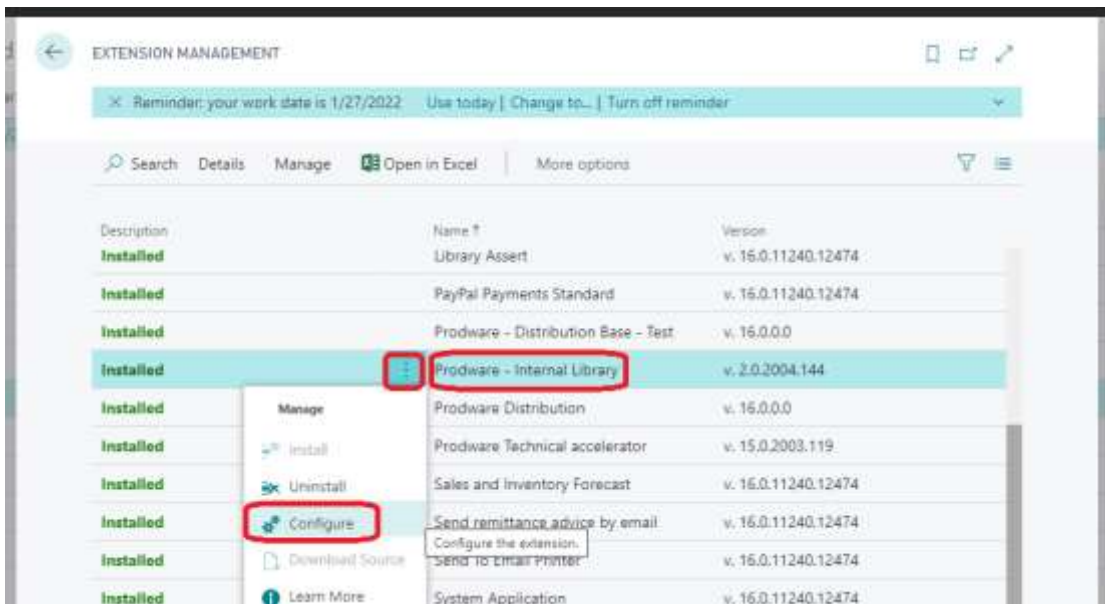
Please follow the procedure below to register the Prodware Project Management App.

You must register and activate a trial license to continue testing the app for a trial period.

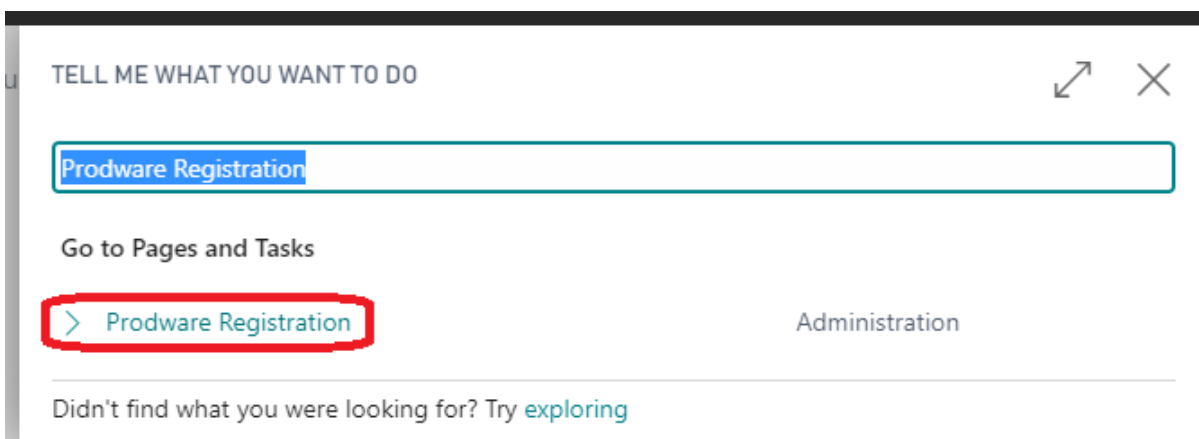
First, ensure that Prodware – Internal Library configuration allows httpClient connections.

Search for "Extension management" to configure the application.





Then search for "Prodware Registration" page:



Then complete all mandatory information or copy it from your company information.

Use "Apply Company Information" to select a company and copy all corresponding information to registration page.

Use "Apply Administrator Information" to select a user and copy their full name and contact email to administrator's information.

The screenshot shows the 'Prodware Registration' form with the following data:

Company	
Name	My Company
Address	5 The Ring
Post Code	W2 8HG
City	London
Country/Region Code	GB
Contact Person	Adam Matteson
Phone No.	0666-666-6666
E-Mail	myaddress@mycompany.mail
VAT Registration No.	77777777

Administrator	
Name	admin
E-Mail	admin@mycompany.mail

Registration	
Id	{00000000-0000-0000-0000-000000000000}

Then click on Register to register to the Prodware License System. A unique ID linked to your information will be granted and can be seen on this page.

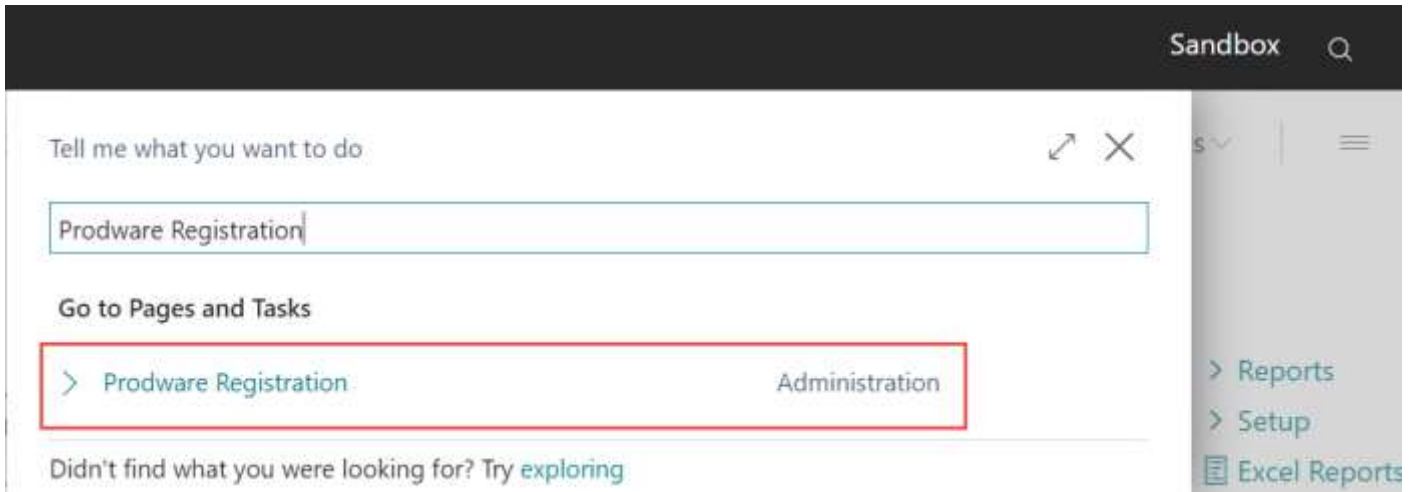
The screenshot shows the 'Prodware Registration' form after registration. The 'Register' button is highlighted with a red box. The 'Id' field in the 'Registration' section is also highlighted with a red box and contains the value: {df6}.

1.3.1.1 Register Prodware Project Management suite app

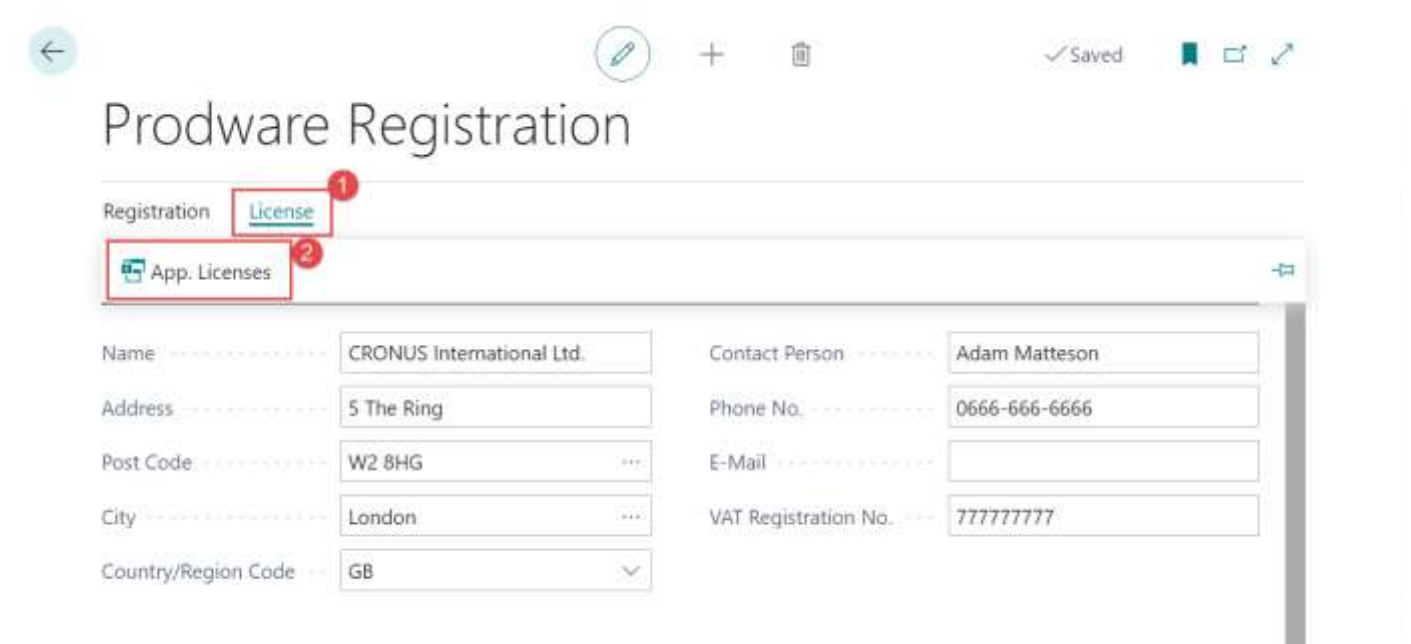
Note: this step is only necessary when installing the Project Management suite app. If you are installing an individual Prodware Project Management app you can skip this step.

When installing the Prodware Project Management suite app all individual apps of the solution are automatically installed as a total solutions and need to be registered as such.

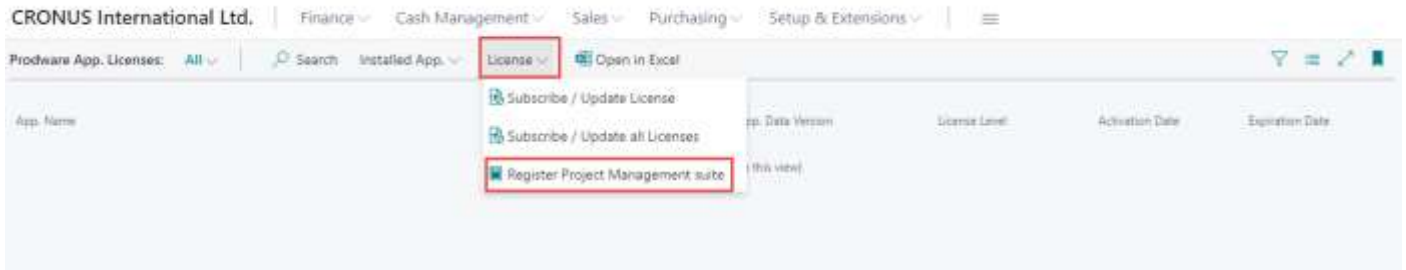
Start by navigating to Prodware Registration using the search function.



From the Prodware Registration page select "License" and then select "App. Licenses".



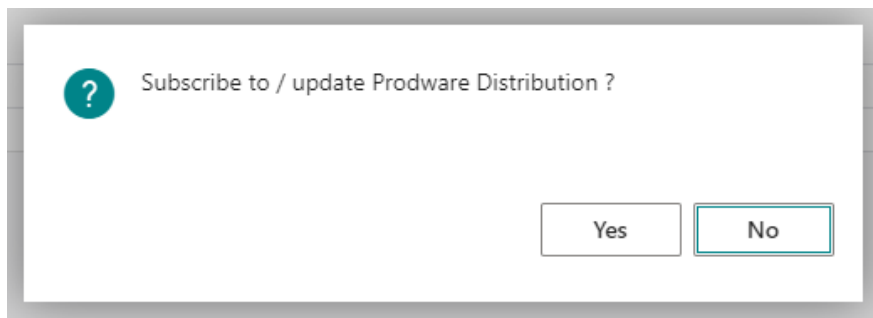
From the Prodware App. Licenses page select "License" and then select Register Project Management suite



All individual apps belonging to the Project Management suite will be registered and will be ready to use with a trial license. After purchasing the apps, please follow the "Update after purchase" chapter of this manual.

1.3.2 Trial license activation

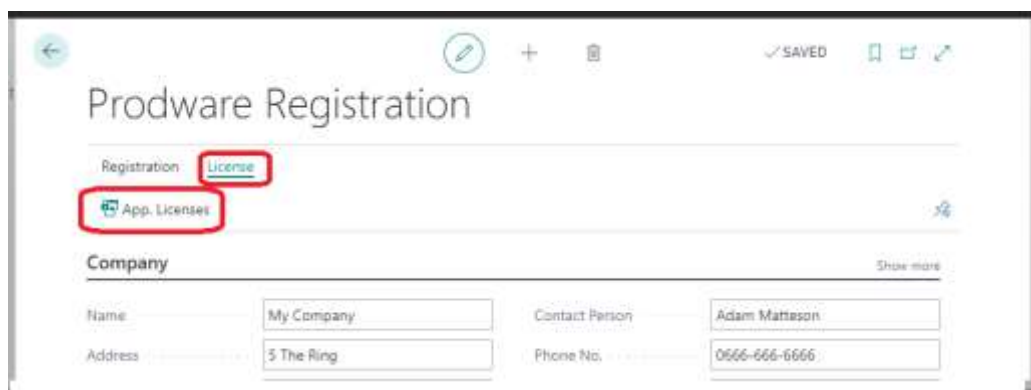
While using this solution, you may be asked to activate a trial license. Just click "Yes" to activate it, which will let you test some of the functionalities of the solution during a given time.



Once the trial has expired, the solution will not be usable in the production environment anymore and will need to be un-installed.

1.3.3 Update after purchase

If you purchased this solution, you can update your license at any time from the "Prodware Registration" page.



Use the Subscribe / Update action button.

The screenshot displays the 'PRODWARE APP. LICENSES' interface. At the top, there is a search bar and navigation options: 'Installed App.', 'License', and 'Open in Excel'. A 'Subscribe / Update License' button is visible. Below this is a table with the following data:

App. Name	App. Version	App. Data Version	License Level	Activatio Date
Prodware Technical accelerator	15.0.2003.119	15.0.2003.119	Premium	5/12/20
Prodware Distribution	16.0.0.0	16.0.0.0	Premium	5/12/20

2. INSTALLATION

2.1 Requirements

Distribution solution is designed for Dynamics 365 Business Central.

To be able to use this functionality your license must be up to date, including the Prodware Project Management App. If necessary, contact your reseller for more information about your Dynamics 365 Business Central license. Please contact Prodware for more information about the Project Management App license. You can still activate a trial period directly from the application.

2.2 Installation

Important: Before any installation and/or modification, you must create a backup of your solution so that you can restore it if you encounter any issue with your set-up.

Refer to Microsoft documentation to install your accelerator as with any Business Central extension.

From AppSource: <https://docs.microsoft.com/en-us/dynamics365/business-central/ui-extensions>

For On premise environment: <https://docs.microsoft.com/en-us/dynamics365/business-central/dev-itpro/developer/devenv-how-publish-and-install-an-extension-v2>

2.3 Upgrading to a new version

Important: Before any installation and - or modification, you must have to create a backup of your solution you can restore if you encounter issues with your set-up.

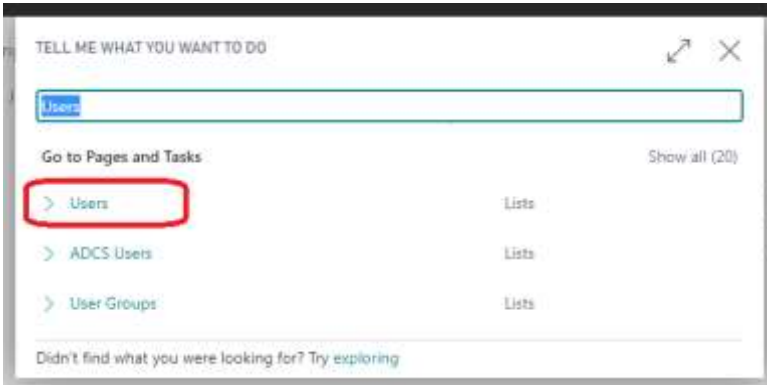
When upgrading from a previous version, the actions are the same as for first installation, please refer to chapter 2.2.

All your previous data will be saved, and no further action is needed.

2.4 Permission sets

To be able to setup and use Prodware Project management features you must set up the correct Permission Sets to users.

Open D365 Business Central as an administrator and search for Users page.



For each user, open the card page to add related feature Permission Set to allow each of them to execute functionalities.

Apply "D365 JOBS, VIEW" to the user to allow viewing only of all Prodware Project Management App features and data through Business Central.

User Permission Sets | Manage

Permission Set T	Description	Company T	Extension Name	Permission Scope
SUPER	This role has all permissions.			System
→ D365 JOBS, VIEW	Dynamics 365 View Jobs			System

Apply "D365 JOBS, EDIT" to the user to allow editing of all Prodware Project Management App features and data through Business Central.

User Permission Sets | Manage

Permission Set T	Description	Company T	Extension Name	Permission Scope
SUPER	This role has all permissions.			System
→ D365 JOBS, EDIT	Dynamics 365 Create Jobs			System

Apply "D365 JOBS, SETUP" to the user to allow setting up all Prodware Project Management App features and data through Business Central.

User Permission Sets | Manage

Permission Set T	Description	Company T	Extension Name	Permission Scope
SUPER	This role has all permissions.			System
→ D365 JOBS, SETUP	Dynamics 365 Jobs Setup			System

3. PROJECT TEMPLATES

3.1 Description and objective

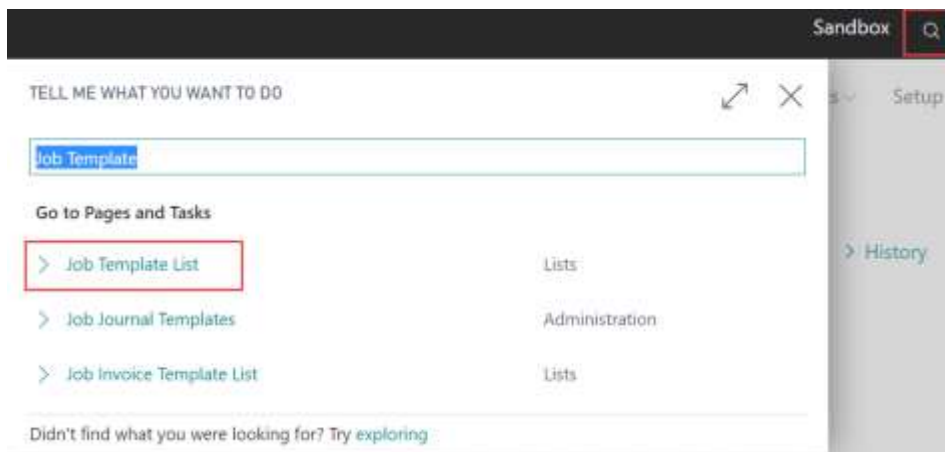
With this functionality a standard Job Template can be set up to create a new Job from a pre-defined template. A Job Template can be used to reduce repetitive actions when entering a new Job in Business Central and can be used to standardize Jobs.

Note: the fields available in a Job Template are generally fields in which a default value can be set up when applying a Job Template to a Job. Most fields in the standard Business Central Job functionality are available in the Job Template. This User Manual is however aimed at setting up and applying Job Template, but will not explain the functionality of the standard fields on a Job Card. For this information, please refer to the available Microsoft documentation of the Jobs functionality in Business Central.

3.2 Setup Job Templates

To be able to create a Job from a Job Template you need to set up a Job Template and determine what data is included in the Job Template.

Search for the "Job Template list" page:



Then select "Job Template List":

← JOB TEMPLATE LIST | WORK DATE: 27/01/2022

Search + New Manage Create Job from Template... Attributes Open in Excel

Code ↑	Description
TEMPLATE 1	Example Template 1
TEMPLATE 2	Example Template 2
TEMPLATE 3	Example Template 3

From this list page you can create new Job Templates or Modify and Delete existing Job Templates.

Multiple Job Templates can be created if multiple types of projects or contracts in your organization are applicable and can be standardized.

Create a new Job Template or Edit an Existing Job Template to open the Job Template Card:

← JOB TEMPLATE CARD | WORK DATE: 27/01/2022

TEMPLATE 1

Create Job from Template... Attributes Actions Navigate Fewer options

General

Code	TEMPLATE 1	Person Responsible	MARK
Description	Example Template 1	Project Manager	ADMIN
Job Description	Job template example	No. Series	JOBS
Job Search Description	JOB TEMPLATE EXAMPLE		

In the Job Template Card you can setup default values in the available fields which will be automatically applied when creating a Job from the Job Template. The Job Template Card contains most fields that are available on the Job card.

Note: When a field does not require a value in a Job Template it can be left empty. This way this field will not be filled with a value when applying the Job Template to a Job.

General tab

In the General tab you can set up default values for the generic information which needs to be entered when creating a Job. A field can be left empty if you don't want to apply a default value for the said field.

Field	Description
Code	A unique code to define the Job Template. When a user creates a Job from a Job Template they will need to select the Job Template code. The application of the Job Template should be recognizable from the code.
Description	A more detailed description as an addition to the Job Template Code. The application of the Job Template should be recognizable from the description.
Job Description	The Description that will be applied to the Job when applying a Job Template
Job Search Description	The Search Description that will be applied to the Job when applying a Job Template. The Job Search Description will be automatically filled when entering the Job Description but can be altered afterwards.
Person Responsible	The Person Responsible that will be applied to the Job when applying a Job Template. A record from the Resource table can be selected in this field.
Project Manager	The Project Manager that will be applied to the Job when applying a Job Template. A record from the User Setup table can be selected in this field.
No. Series	In this field a No. Series can be selected for this Job Template. When a Job Template is applied the selected No. Series in this field will be used to determine the Job No. If this field is left empty, the default No. Series set up in the Job Setup is used when applying the Job Template

Tasks tab

Job Task No.	Description	Job Task Type	WIP Method	Job Posting Group	Totaling	WIP Total	Job Invoice Template Code
01. CONTR...	Contract & Calculation	Begin-Total					
→ 01.1 PLANN...	Planning	Posting		SETTING UP			
01.2. CALCU...	Calculation	Posting		SETTING UP			
01.3. CONT...	Contract Invoicing	Posting		SETTING UP			JOBINV01
01.4. CON...	Contract & Calculation	End-Total			01. CONTRACT..01.4. CONTRACT		
02. DELIVE...	Delivery	Begin-Total					
02.1. PROC...	Procurement	Posting		SETTING UP			

In the Tasks tab you set up the task & activity structure of a project. In a the Job Template a standardized Job Task structure can be set up so it will be automatically applied when creating a job from a Job Template.

Field	Description
Job Task No.	A unique code to define the Job Task in a Job.
Description	A description of the Job Task.
Job Task Type	Used to determine whether the task is used as a Heading, Total, Begin-Total, End-Total or for Posting.
WIP method	Used to determine the Work in Progress calculation Method for the Job Task.
Totaling	Determines how the financial results of a Job will be totaled for a task of the End-Total or Total Job Task Type. The totaling calculation is automatically filled when a Begin-Total and End-Total is set up in the Task structure.
WIP-Total	Used to specify whether the WIP calculation is used or excluded from the total.

Additionally the Line function “Indent Job Tasks” can be used to automatically indent the Job Task structure according to the Job Task Type setup in the Task structure.

Posting tab



Field	Description
Status	The status that will be applied to the Job when applying a Job Template
WIP Method	The WIP Method that will be applied to the Job when applying a Job Template
WIP Posting Method	The WIP Posting Method that will be applied to the Job when applying a Job Template
Allow Schedule/Contract Lines	Used to determine if the use of the Schedule/Contract lines parameter is enabled or disabled on the Job when applying a Job Template.
Apply Usage Link	Used to determine if the use of the Apply Usage Link parameter is enabled or disabled on the Job when applying a Job Template.
Job Posting Group	The Job Posting Group that will be applied to the Job when applying a Job Template. A value from the Job Posting Group table can be selected in this field

Foreign Trade tab

Foreign Trade

Currency Code: Exch. Calculation (Cost): Fixed FCY

Invoice Currency Code: Exch. Calculation (Price): Fixed FCY

Field	Description
Currency Code	The Currency code that will be applied to the Job when applying a Job Template. A value from the currency table can be selected in this field
Invoice Currency Code	The Invoice Currency code that will be applied to the Job when applying a Job Template. A value from the currency table can be selected in this field
Exch. Calculation (Cost)	The Exch. Calculation (Cost) method that will be applied to the Job when applying a Job Template
Exch. Calculation (Price)	The Exch. Calculation (Price) method that will be applied to the Job when applying a Job Template

Dimensions

In a Job Template Dimensions can be set up which will automatically will be applied to a Job when applying a Job Template.

Select the Navigate tab and then select Dimensions

JOB TEMPLATE CARD | WORK DATE: 27/01/2022

TEMPLATE 1

Attributes Dimensions

Job Sub No.	Description	Job Sub Type	ERP Method	Job Posting Group	Posting	WP Total	Job Invoice Template Code
01. CONTRACT	Contract & Calculation	Begin-Total					
01.1 PLANNING	Planning	Posting		SETTING UP			
01.2. CALCULATION	Calculation	Posting		SETTING UP			
01.3. CONTRACT	Contract Invoicing	Posting		SETTING UP			JOBINVS1
01.4. CONTRACT	Contract & Calculation	End-Total			01. CONTRACT.01.4. CONTRACT		
02. DELIVERY	Delivery	Begin-Total					
02.1. PROCUREMENT	Procurement	Posting		SETTING UP			
02.2. MANUFACTURE	Manufacturing	Posting		SETTING UP			
02.3. INSTALLATION	Installation	Posting		SETTING UP			
02.4. DELIVERY	Delivery	End-Total			02. DELIVERY.02.4. DELIVERY		

JOB TEMPLATE TEMPLATE 1 | WORK DATE: 27/01/2022

Default Dimensions | Search + New Edit List Delete Open in Excel

Dimension Code ↑	Dimension Value Code	Value Posting
→		

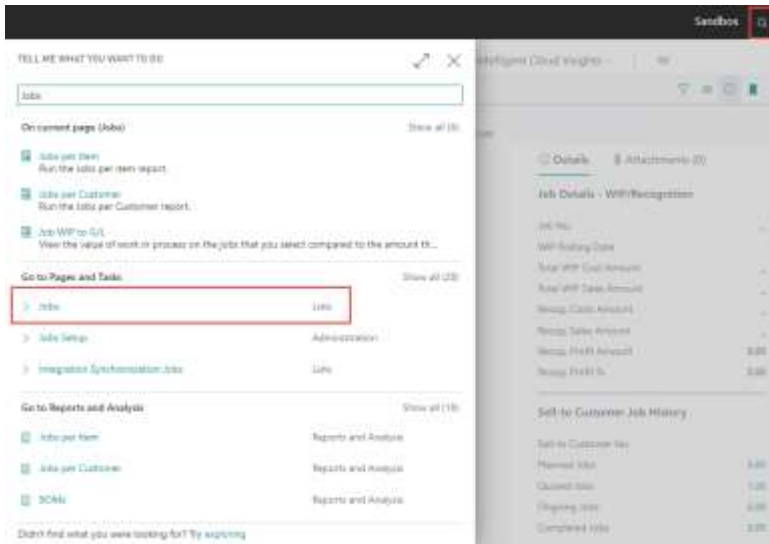
This will open the Default Dimension table in which default dimensions can be set up for the Job Template.

3.3 Create Job from a Job Template

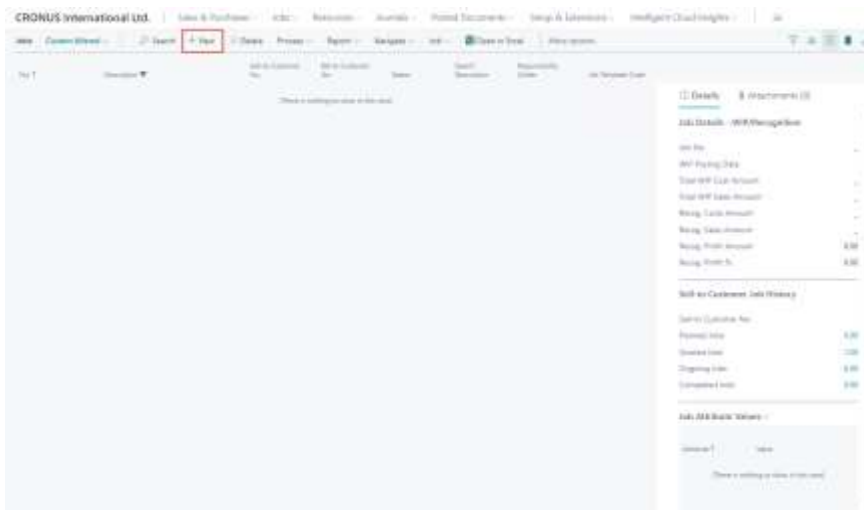
When creating a new Job

When a Job Template has been set up the user will automatically be prompted to apply a Job Template when creating a New Job from the Job List.

Navigate to Jobs



From the Job List select "New"



The user will be prompted to apply a Job Template

Field	Description
Job Template Code	Select the Job Template code which you want to apply when applying the Job
Job Template Description	The description from the Job Template. Will be automatically filled when a Job Template code is selected
Job No.	Used to apply a specific Job No. when applying the Job. If left empty the Job No. will be determined based on the No. Series in the Job Template or the No. Series in the Job Setup if the No. Series on the Job Template is left empty
Job Description	Used to apply a specific Job Description when applying the Job. If left empty the Job Description from the Job Template will be applied
Sell-to Customer No.	The Sell-to Customer No. which will be applied when applying the Job.
Bill-to Customer No.	The Bill-to Customer No. which will be applied when applying the Job. This field is automatically filled based on the Bill-to customer of the Customer.
Ship-to Code	The Ship-to Code which will be applied when applying the job. This field is automatically filled based on the Ship-to Code of the customer
Apply Job Tasks	Used to determine if the Job Task structure set up in the Job Template should be applied to the Job
Apply Dimensions	Used to determine if the Dimensions set up in the Job Template should be applied to the Job.
Apply Job Attributes	Used to determine if the Job Attributes set up in the Job Template should be applied to the Job. This option is only available when the Job Attributes App is also installed. For a more detailed description see chapter 4.

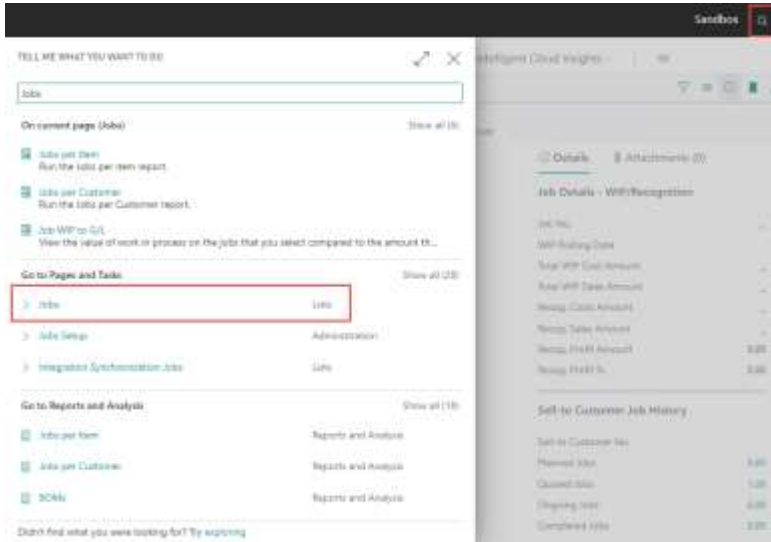
When selecting OK the selected Job Template will be applied to the newly created Job.

When selecting Cancel no Job Template will be applied and a blank Job will be created.

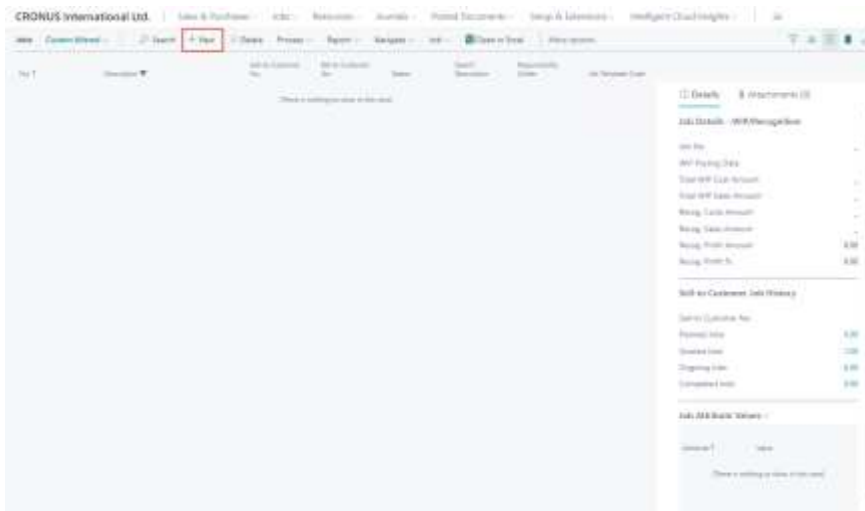
Applying Job Template after creating a new Job

When manually creating a new blank Job it is possible to apply a Job Template from the Job Card.

Navigate to Jobs



From the Job List select "New"



Create a new blank Job

Note: The Job No. must be entered before being able to apply a Job Template to a Job.

Job Card
J00050

Process Report Prices & Discounts WIP Navigate Job Print/Send More options

Copy Job Tasks from... Copy Job Tasks to... Apply Job Template...

No. J00050 Description Customer Name External Document No. Person Responsible

Account Last Date Modified 3/25/2022 Project Manager Responsibility Center Job Template Code

Job Task No.	Description	Job Task Type	Start Date	End Date	Budget (Total Cost)	Actual (Total Cost)	Balance (Total Price)	Invoice (Total Price)
		Posting						

Posting

Status: Open % Completed: 0.00

Job Details - No. of Prices

Job No.	200050
Resource	0
Item	0
G/L Account	0

Job Details

Job No.	200050
Budget Cost	
Resource	0.00
Item	0.00
G/L Account	0.00
Total	0.00
Actual Cost	
Resource	0.00
Item	0.00
G/L Account	0.00
Total	0.00

Select the Process tab and then select the "Apply Job Template" function.

Edit - Apply Job Template

Job Template

Job Template Code Job Template Descripti...

Job

Job No. J00050 Bill-to Customer No. ...

Job Description Ship-to Code ...

Sell-to Customer No. ...

Apply

Apply Job Tasks On Apply Job Attributes On

Apply Dimensions On

OK Cancel

Field	Description
Job Template Code	Select the Job Template code which you want to apply when applying the Job
Job Template Description	The description from the Job Template. Will be automatically filled when a Job Template code is selected
Job No.	Used to apply a specific Job No. when applying the Job. If left empty the Job No. will be determined based on the No. Series in the Job Template or the No. Series in the Job Setup if the No. Series on the Job Template is left empty
Job Description	Used to apply a specific Job Description when applying the Job. If left empty the Job Description from the Job Template will be applied
Sell-to Customer No.	The Sell-to Customer No. which will be applied when applying the Job.
Bill-to Customer No.	The Bill-to Customer No. which will be applied when applying the Job. This field is automatically filled based on the Bill-to customer of the Customer.
Ship-to Code	The Ship-to Code which will be applied when applying the job. This field is automatically filled based on the Ship-to Code of the customer
Apply Job Tasks	Used to determine if the Job Task structure set up in the Job Template should be applied to the Job
Apply Dimensions	Used to determine if the Dimensions set up in the Job Template should be applied to the Job.
Apply Job Attributes	Used to determine if the Job Attributes set up in the Job Template should be applied to the Job. This option is only available when the Job Attributes App is also installed. For a more detailed description see chapter 4.

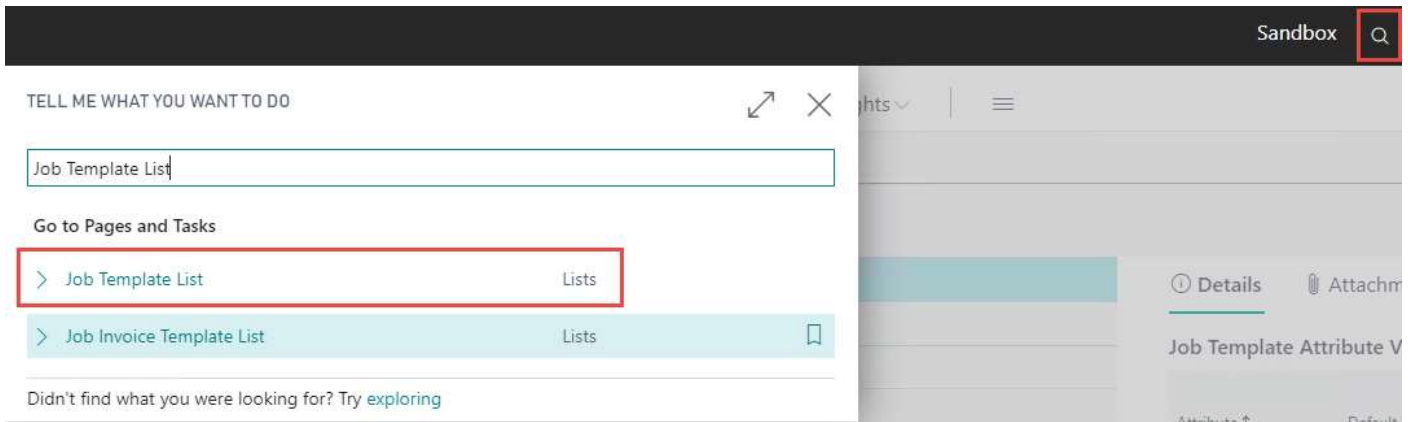
When selecting OK the selected Job Template will be applied to the existing Job.

When selecting Cancel the Job Template will not be applied to the existing Job.

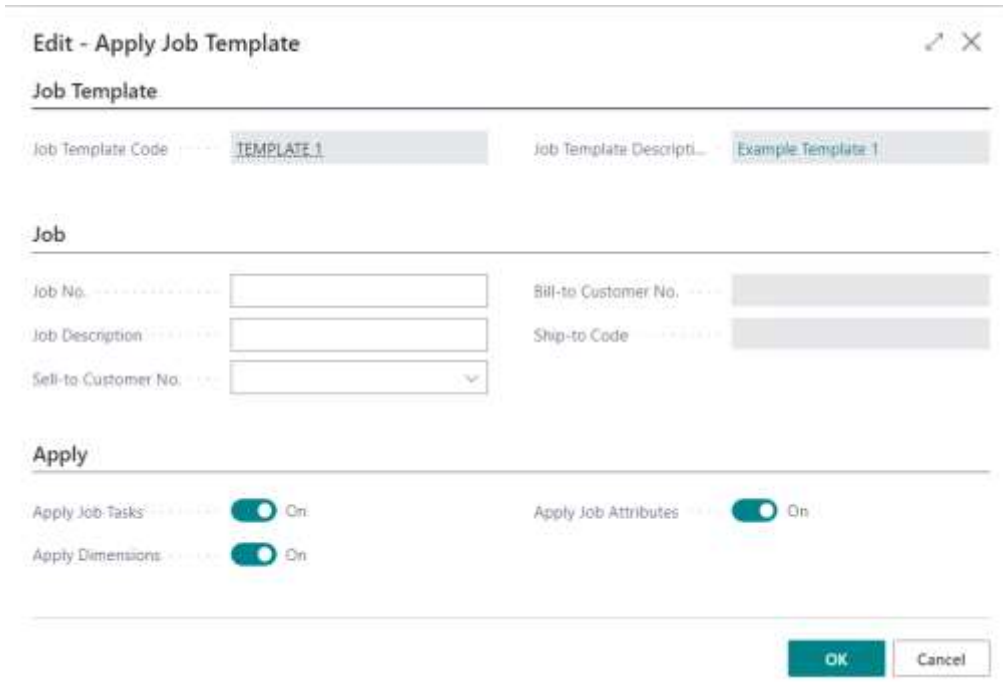
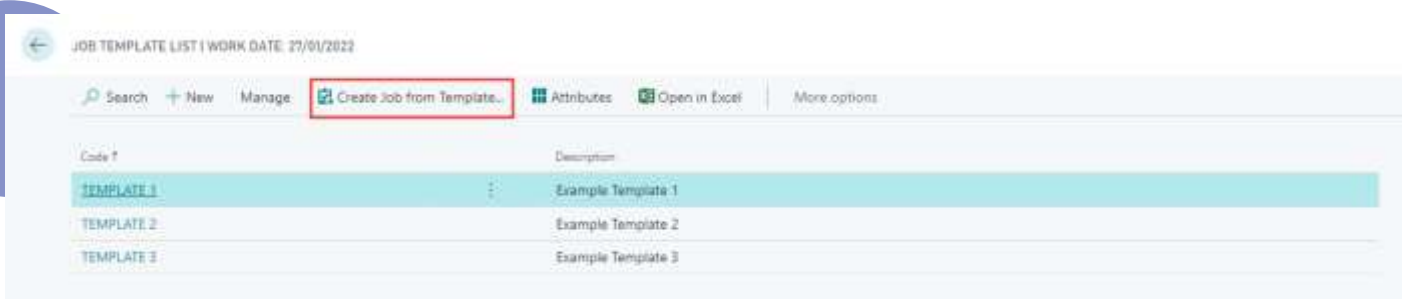
Note: When applying a Job Template to an existing Job all data, which is entered on the Job beforehand, will be lost. Even for fields which are not included in the Job Template. Therefore, it is important to apply a Job Template before adding other data to the Job.

Creating new Job from Job Template from Job Template List

Navigate to Job Template List



Select a Job Template from the list and then select Create Job Template



Field	Description
Job Template Code	Select the Job Template code which you want to apply when applying the Job
Job Template Description	The description from the Job Template. Will be automatically filled when a Job Template code is selected
Job No.	Used to apply a specific Job No. when applying the Job. If left empty the Job No. will be determined based on the No. Series in the Job Template or the No. Series in the Job Setup if the No. Series on the Job Template is left empty
Job Description	Used to apply a specific Job Description when applying the Job. If left empty the Job Description from the Job Template will be applied
Sell-to Customer No.	The Sell-to Customer No. which will be applied when applying the Job.
Bill-to Customer No.	The Bill-to Customer No. which will be applied when applying the Job. This field is automatically filled based on the Bill-to customer of the Customer.
Ship-to Code	The Ship-to Code which will be applied when applying the job. This field is automatically filled based on the Ship-to Code of the customer
Apply Job Tasks	Used to determine if the Job Task structure set up in the Job Template should be applied to the Job
Apply Dimensions	Used to determine if the Dimensions set up in the Job Template should be applied to the Job.
Apply Job Attributes	Used to determine if the Job Attributes set up in the Job Template should be applied to the Job. This option is only available when the Job Attributes App is also installed. For a more detailed description see chapter 4.

4. ATTRIBUTES

4.1 Description and objective

With this functionality a Job can be enriched with Job Attributes to add additional data and characteristics which cannot be stored in a field on the standard Job Card. Job Attributes is flexible to set up so a user can add as many Job Attributes to a Job as they want. Additionally, the Job Attributes can be used to filter the Job List to improve recognizability and finding a Job. Job Attributes can also be set up in a Job Template (see Chapter 3) so Job Attributes are automatically added to a Job when applying a Job Template.

4.2 Set up Job Attributes

To be able to apply Job Attributes to a Job or a Job Template, the Job Attributes which may be used in your organization must be set up first.

Navigate to Job Attributes

The screenshot displays the user interface for setting up Job Attributes. At the top, there is a search bar containing 'Job Attributes' and a 'Go to Pages and Tasks' section with a highlighted 'Job Attributes' link. Below this, a table lists various Job Attributes with their respective types and descriptions.

Code T	Type	Description	Blocked
→ ATTRIBUTE BOOLEAN	Boolean	Example Boolean	<input type="checkbox"/>
ATTRIBUTE DATE	Date	Example Date	<input type="checkbox"/>
ATTRIBUTE DECIMAL	Decimal	Example Decimal	<input type="checkbox"/>
ATTRIBUTE FREE TEXT	Free Text	Example Free text	<input type="checkbox"/>
ATTRIBUTE OPTION	Option List	Example Option	<input type="checkbox"/>

The Job Attribute List page is the page in which you can set up the attributes that can be used and applied to Jobs and Job Templates. You can Create, modify and Delete Job Attributes using the according functions on this page.

Field	Description
Code	A unique code to define the Job Attribute. When a user adds a Job Attribute to a Job or Job Template the Job Attribute code needs to be selected. The application of the Job Attribute should be recognizable from the code.
Type	Select the Type for the Job Attribute. The following types are available: <ul style="list-style-type: none"> • Boolean: used to specify attributes with a true or false value • Date: used to specify attributes with a date value • Decimal: used to specify attributes with a numeric decimal value • Free text: used to specify attributes with a text value • Integer: used to specify attributes with a whole number value • Option List: used to specify attributes with a pre-defined option list. See the explanation on adding options below this table for more detail.
Description	A more detailed description as an addition to the Job Attribute Code. The application of the Job Attribute should be recognizable from the description.
Blocked	Used to block the attribute for further use. Note that this will only block adding the attribute to new Jobs or Job Templates. If the blocked attribute is already applied to a Job or Job Template before blocking the Attribute it can still be used in that Job or Job Template.

Setting up option values for the Job Attribute Type: Option List

When the Job Attribute Type Option List is selected the Job Attribute Option Values function will be active on the Job Attribute List Page.

Code T	Type	Description	Blocked
ATTRIBUTE BOOLEAN	Boolean	Example Boolean	
ATTRIBUTE DATE	Date	Example Date	
ATTRIBUTE DECIMAL	Decimal	Example Decimal	
ATTRIBUTE FREE TEXT	Free Text	Example Free text	
ATTRIBUTE OPTION	Option List	Example Option	

Select Job Attribute Option Values

JOB ATTRIBUTE OPTION VALUES | WORK DATE: 27/01/2022 ✓ SAVED

Search + New Edit List Delete Open in Excel

Sequence No. ↑	Attribute Option Value
1	Option 1
2	Option 2
3	Option 3

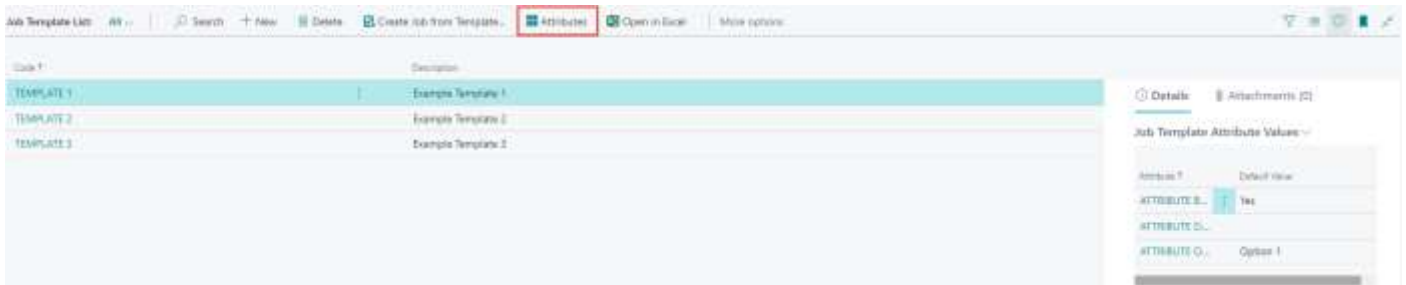
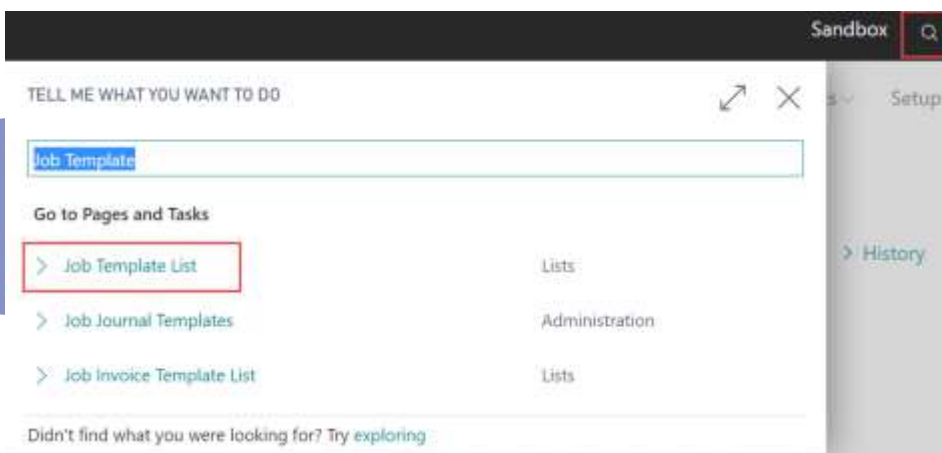
In this page option values can be set up for the selected Job Attribute of the Option List type.

Field	Description
Sequence No.	Used to determine the sequence in which the options will show when applying the Job Attribute to a Job or Job Template. A numeric sequence from lower to higher can be set up in this field.
Attribute Option Value	Used to specify the value of the option

4.3 Setting up Job Attributes in a Job Template

To automatically apply Job Attributes to a Job when creating a Job from a Job Template, Job Attributes must first be set up in a Job Template.

Search for Job Template List



In the Job Template list the applied Job Template Attribute Values are shown in the related factbox on the list page.

Select Attributes to open the Job Template Attribute Values for the selected Job Template



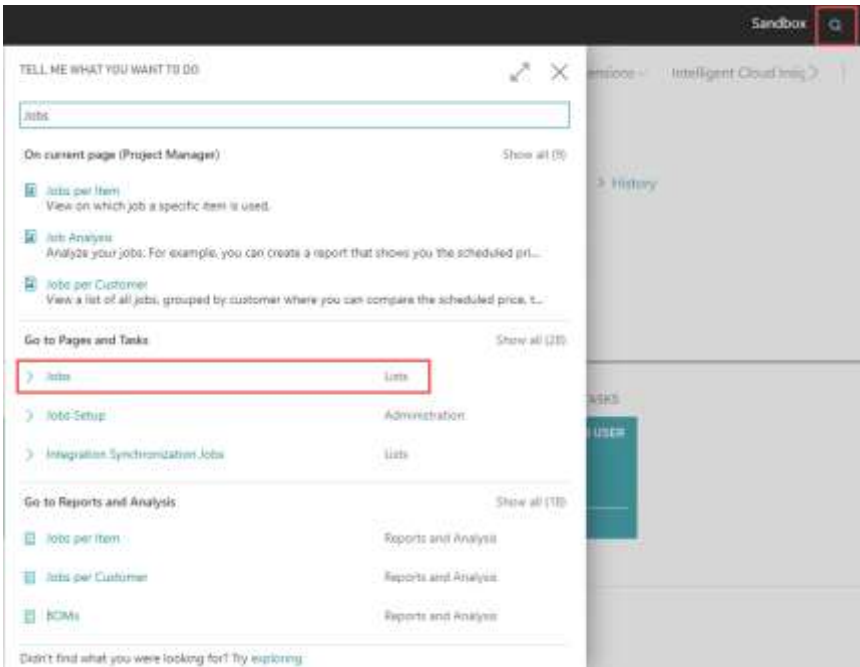
In the Job Template Attribute Values page Job Attributes can be managed which are applied to the Job Template. When a Job Attribute is present in this list the Job Attribute will be applied to the Job when applying the Job Template to a Job (see chapter 3 for using and setting up Job Templates).

Field	Description
Attribute Code	The code of the Job Attribute. This field needs to be selected to add a Job Attribute to a Job Template
Attribute Description	The description of the Job Attribute. This field will be automatically filled when selecting a Attribute Code
Attribute Type	The Attribute Type of the Job Attribute. This field will be automatically filled when selecting an Attribute Code
Optional	This field can be used to specify whether the Attribute will be automatically applied when creating a new Job from a Job Template. If the Box is unchecked the Job Attribute will be automatically applied to the Job from the Job Template. If the Box is checked the Job Attribute will not be automatically applied to the Job from the Job Template. The user has the possibility and choice to add Job Attributes with the Optional value checked manually after applying the Job Template to a Job.
Default Value	Used to determine a default value for a Job Attribute in a Job Template. If a default value is filled the value will automatically be applied to the Job Attribute when applying the Job Template to a Job.

4.4 Applying and managing Job Attributes to a Job

Job Attributes are managed from the Job Card

Navigate to Jobs



From the Job List the Job Attributes which are added to a Job are visible in a factbox.

No.	Description	Sell-to Customer No.	Bill-to Customer No.	Status	Search Description	Responsibility Center	Job Template Code
JOB0029	Job Attribute example	11502090	11503090	Open	JOB ATTRIBUT...		TEMPLATE 1

Details Attachments (0)

Job Attribute Values

Attribute ↑ Value

ATTRIBUTE BOOLEAN Yes

ATTRIBUTE DECIMAL

ATTRIBUTE OPTION Option 1

This way Job Attribute data is presented for the selected Job without opening the Job.

Select a Job and open a Job Card.

Job Attribute Values

Attribute ↑ Value

ATTRIBUTE BOOLEAN Yes

ATTRIBUTE DECIMAL

ATTRIBUTE OPTION Option 1

From the Job Card the Job Attributes are also visible in a factbox.

To manage Job Attributes for a Job select the Job tab and then select the Attributes function

Attribute Code ↑	Attribute Description	Attribute Type	Attribute Value
→ ATTRIBUTE BOOLE...	Example Boolean	Boolean	Yes
ATTRIBUTE DECIMAL	Example Decimal	Decimal	
ATTRIBUTE OPTION	Example Option	Option List	Option 1

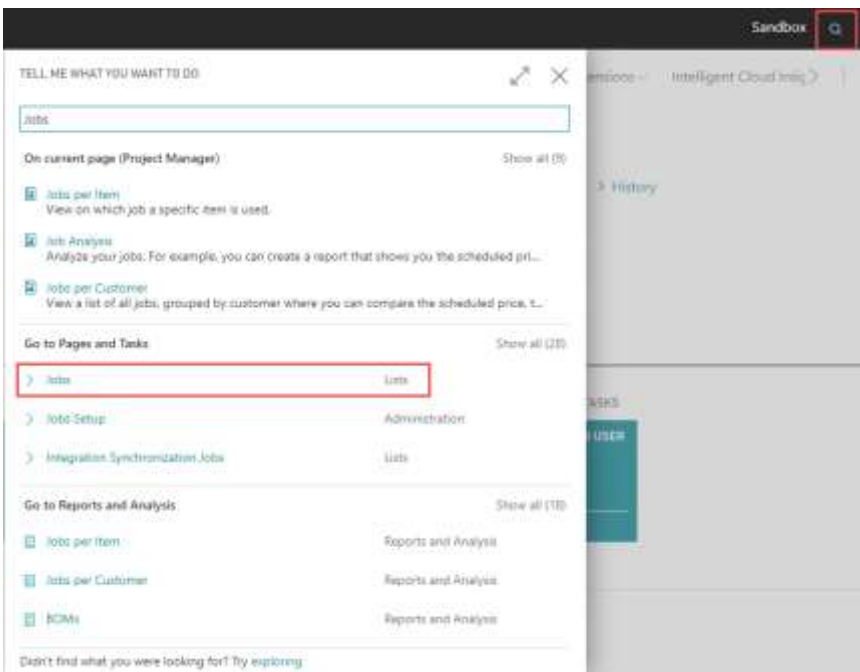
From this list Job Attributes and their values for the specific Job can be managed.

Field	Description
Attribute Code	The code of the Job Attribute. This field needs to be selected to add a Job Attribute to a Job
Attribute Description	The description of the Job Attribute. This field will be automatically filled when selecting a Attribute Code
Attribute Type	The Attribute Type of the Job Attribute. This field will be automatically filled when selecting an Attribute Code
Attribute Value	The value for the Job Attribute for this specific Job.

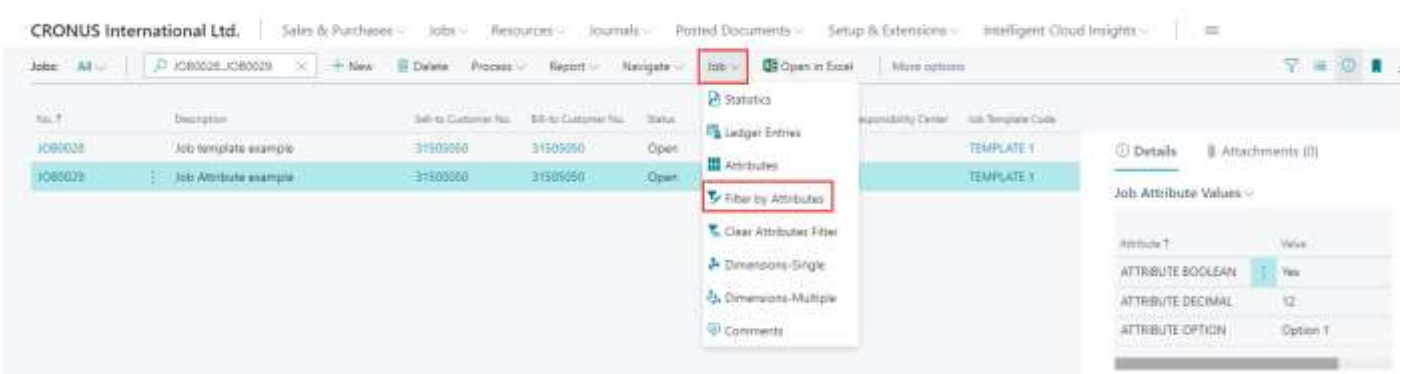
4.5 Filtering the Job List using Job Attributes

Job Attributes which are applied to Jobs can be used to filter the Job list.

Navigate to Jobs



In the Job List a filter can be applied based on the Job Attributes added to Jobs. Select the Jobs tab and then select Filter by Attributes



From this page Job Attributes with certain values can be selected to set a filter on the Job List page.

EDIT - FILTER JOB ATTRIBUTE

Attribute Code T	Attribute Value Filter	Attribute Description	Attribute Type
→ ATTRIBUTE OPTION	Option 1	Example Option	Option List

Field	Description
Attribute Code	The code of the Job Attribute. This field needs to be selected to set a filter on the Job Attribute with a certain value.
Attribute Value Filter	Used to set a value of a Job Attribute code with which the filter on the Job List will be set.
Attribute Description	The description of the Job Attribute. This field will be automatically filled when selecting a Attribute Code
Attribute Type	The Attribute Type of the Job Attribute. This field will be automatically filled when selecting an Attribute Code

Select OK to set the filter on the Job List according to the selected Job Attributes and their respective values.

Select Cancel to not set a filter on the Job List.

To modify the Job Attribute Filter in the Job list the Filter by Attributes page can be reopened.

To remove the Job Attribute Filter from the Job List the Clear Attributes Filter function can be used. On the Job List select the Job Tab and then select Clear Attributes Filter.

The screenshot shows the Job List interface with a table containing one job entry: JOB0029, Job Attribute example, 31505050, 31505050, Open. A dropdown menu is open for the 'Job' tab, listing various actions. The 'Clear Attributes Filter' option is highlighted with a red box.

No. T	Description	Self-to Customer No.	Bill-to Customer No.	Status	Responsibility Filter	Job Template Code
JOB0029	Job Attribute example	31505050	31505050	Open		TEMPLATE 1

5. INVOICE TEMPLATE

5.1 Description and objective

With this functionality a standard Job Invoice Template can be set up to create a invoicing/billing schedule which can be applied to Job Planning Lines in a Job. This can be used for projects & contracts for which a contractual amount has been agreed upon which will be billed to a customer according to a agreed upon invoicing/billing schedule. Applying a Job Invoice Template in a Job will generate Job Planning Lines of the "Billable" type for which Sales Invoices can be created to bill the project customer according to the agreed upon schedule. This functionality aims to provide efficiency and error reduction by allowing users to generate invoicing/billing schedules automatically instead of entering them manually in a Job.

5.2 Understanding Job Invoice Templates

Before setting up Job Invoice Templates it's important to understand the starting points and purpose behind the functionality. Understanding the starting points will help understanding the setup and functionality. The purpose of Job Invoice Templates is to help the user when setting up a invoicing/billing schedule in a Job based on a contractual value for the project. This contractual value needs to be set up in the Job first, so the Job Invoice Template can be applied to the contractual value, which will create the invoicing/billing schedule with the contractual value spread out in the schedule accordingly.

Example:

The agreed upon contractual value for a project is €12.000,-. In this project the contractual value will be invoiced in monthly terms over the coming year. Having a monthly Job Invoice Template set up accordingly the following invoicing/billing schedule will be generated when applying the Job Invoice Template to the contractual value:

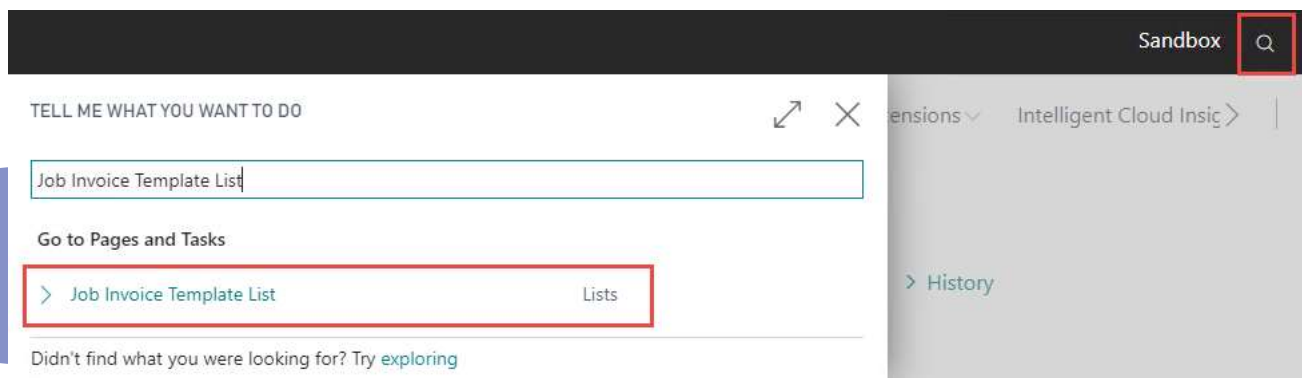
Term	Invoice value
January	€1000,-
February	€1000,-
March	€1000,-
April	€1000,-
May	€1000,-
June	€1000,-
July	€1000,-
August	€1000,-
September	€1000,-
October	€1000,-
November	€1000,-
December	€1000,-



Tip: If you are having trouble determining an efficient way to structure Jobs in Business Central and find it difficult to understand how contractual values in a Job can be set up and managed, feel free to contact Prodware. Prodware has years of experience helping customers to determine the optimal way to structure and set up their Jobs in Business Central.

5.3 Setting up a Job Invoice Template

To be able to use Job Invoice Templates in Jobs or Job Templates, a Job Invoice Template must first be set up. Navigate to Job Invoice Template List



From the Job Invoice Template List Job Invoice Templates can be managed. Multiple Invoice/billing schedules can be created if they are relevant in your business.

JOB INVOICE TEMPLATE LIST | WORK DATE: 27/01/2022

Code	Description	Total Percentage	Date Last Modified	Last Modified By	Status
JOBINV01	Job Invoice Template example 1	100.00	08/04/2021	ADMIN	Released
JOBINV02	Job Invoice Template example 2	100.00	08/04/2021	ADMIN	Released

Select a Job Invoice Template to open the Job Invoice Template Card

JOBINV01

Release Reopen

General

Code	JOBINV01	Job Posting Group	SETTING UP
Description	Job Invoice Template example 1	Creation Date	03/02/2021
Date Calculation	Forward	Date Last Modified	08/04/2021
Invoicing Method	Fixed Price	Last Modified By	ADMIN
Total Percentage	100.00	Status	Released

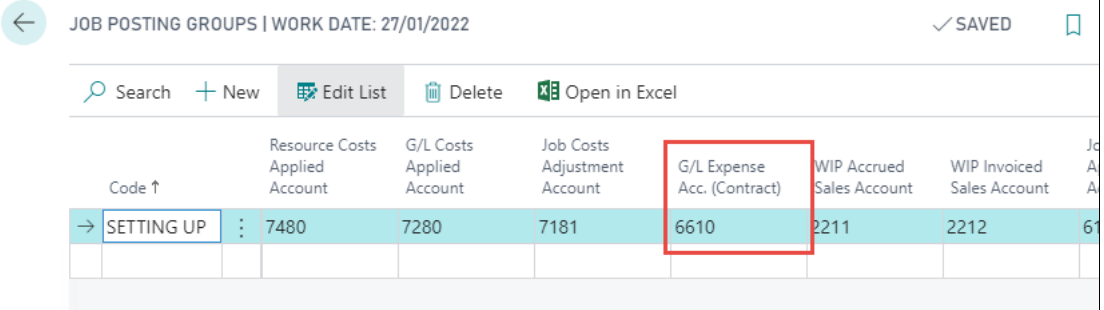
Job Invoice Template Lines

Description	Invoicing Date Formula	Percentage
→ 1st term - In advance	0M	60.00
2nd term - at project start	2M	20.00
3rd term - at project delivery	6M	20.00

General tab

In the General tab general information and calculation methods are available for the Job Invoice Template.

Field	Description
Code	A unique code to define the Job Invoice Template. When a user adds a Job Invoice Template to a Job or Job Template the Job Invoice Template code needs to be selected. The application of the Job Invoice Template should be recognizable from the code.
Description	A more detailed description as an addition to the Job Invoice Template Code. The application of the Job Invoice Template should be recognizable from the description.
Date Calculation	Used to determine the way dates are calculated in the invoicing/billing schedule generated by the Job Invoice Template. The following options are available: <ul style="list-style-type: none"> Manual: dates have to be manually determined after applying an Job Invoice Template. The terms will be generated in the Job, but planning date fields will be left blank. Forward: dates will automatically be determined after applying a Job Invoice Template. The planning date of the term will be calculated forwards based on the Starting Date field of the Job. For example: the starting date on the Job Card is 01/01/2021 and the Invoicing Date Formula (see explanation on the Job Invoice Template Lines tab) is 1M the planning date will be calculated as following: 01/01/2021 + 1 Month = 01/02/2021.

	<ul style="list-style-type: none"> Backward: dates will automatically be determined after applying a Job Invoice Template. The planning date of the term will be calculated backwards based on the Starting Date field of the Job. For example: the starting date on the Job Card is 01/01/2021 and the Invoicing Date Formula (see explanation on the Job Invoice Template Lines tab) is 1M the planning date will be calculated as following: 01/01/2021 - 1 Month = 01/12/2020.
Total Percentage	The Total Percentage of the percentages of the Job Invoice Template Lines. The total must equal to 100 before a Job Invoice Template can be released.
Job Posting Group	<p>Determines the G/L account with which the terms of the Job Invoice Template will be generated. G/L account set up in the "G/L Expense Acc. (Contract)" field will be used to determine the G/L account for the generated terms.</p> 
Creation Date	The creation date of the Job Invoice Template.
Date Last Modified	The date on which the Job Invoice Template was last modified.
Last Modified By	The user who modified the Job Invoice Template last.
Status	The status of the Job Invoice Template. Only released invoice templates can be used in jobs.

Job Invoice Template Lines

Field	Description
Description	The description of the term in the invoice template. This will be the description of the term which will be applied when generating a invoice schedule from a invoice template.
Invoicing Date Formula	The date formula which will be used to calculate the Planning Date of the Job Planning Line which will be generated when applying the invoice template. The Planning Date calculation date is as following: Starting Date of the Job + Invoicing Date Formula. The direction of the calculation will be determined by the Date Calculation field in the General tab. The standard date formulas in Business Central can be applied. Please refer to Microsoft's documentation on date formulas for more information.
Percentage	The percentage of the term. The Line Amount of the Budget Line on which the invoice template will be applied will be divided among the generated terms according to the percentage of the term.

Releasing and Re-opening a Job Invoice Template

To apply a Job Invoice Template in a Job the status must be set to "Released". Before editing data in a Job Invoice Template the status must be set to "Open". The Release and Re-open functions can be used to edit the Status.

...PLATE CARD | WORK DATE: 27/01/2022

✓ SAVED

JOBINV01

Release Reopen

General

Code	JOBINV01	Job Posting Group	SETTING UP
Description	Job Invoice Template example 1	Creation Date	03/02/2021
Date Calculation	Forward	Date Last Modified	08/04/2021
Invoicing Method	Fixed Price	Last Modified By	ADMIN
Total Percentage	100.00	Status	Released

Job Invoice Template Lines | Manage

Description	Invoicing Date Formula	Percentage
→ 1st term - In advance	0M	60.00
2nd term - at project start	2M	20.00
3rd term - at project delivery	6M	20.00

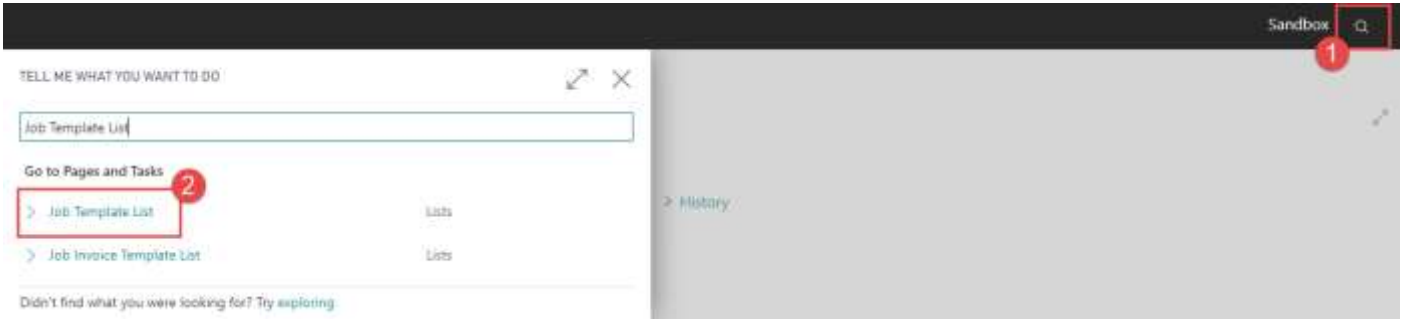
5.4 Setting up a Job Invoice Template in a Job Template

Note: This chapter is only relevant when you use the Prodware Projectmanagement – Project Templates App. For more information on Job Templates and how to create them please refer to chapter 3 of this manual.

Job Invoice Templates can be set up in Job Templates to determine what Job Invoice Template should be applied to a Job Task.

Navigate to "Job Template List" using the search function.

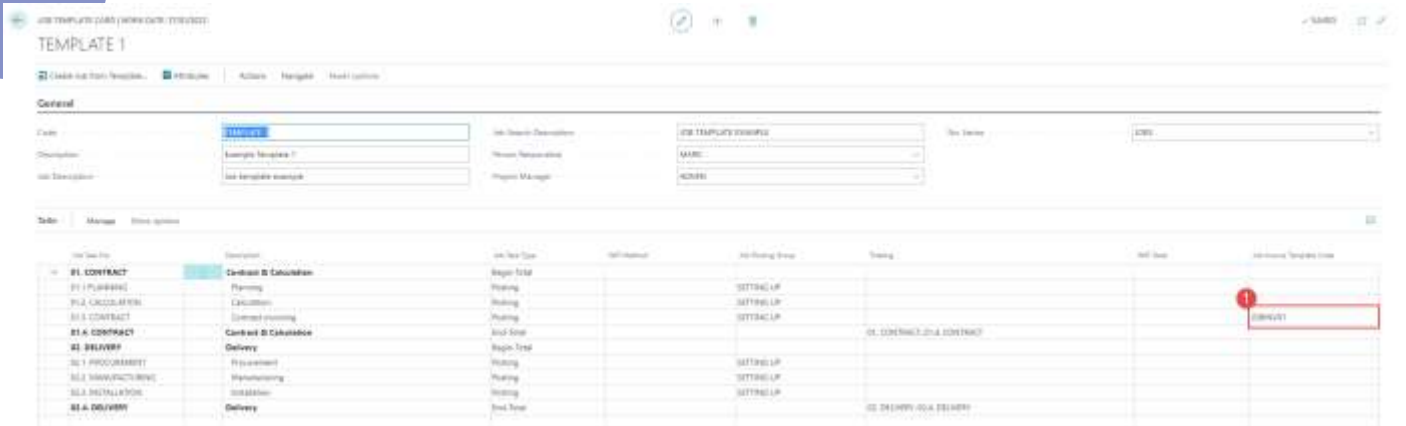




From the Job Template List select a Job Template Code to open a Job Template.



In the Job Template Card the following field can be set up to determine a default Job Invoice Template Code for Job Tasks in the Template.

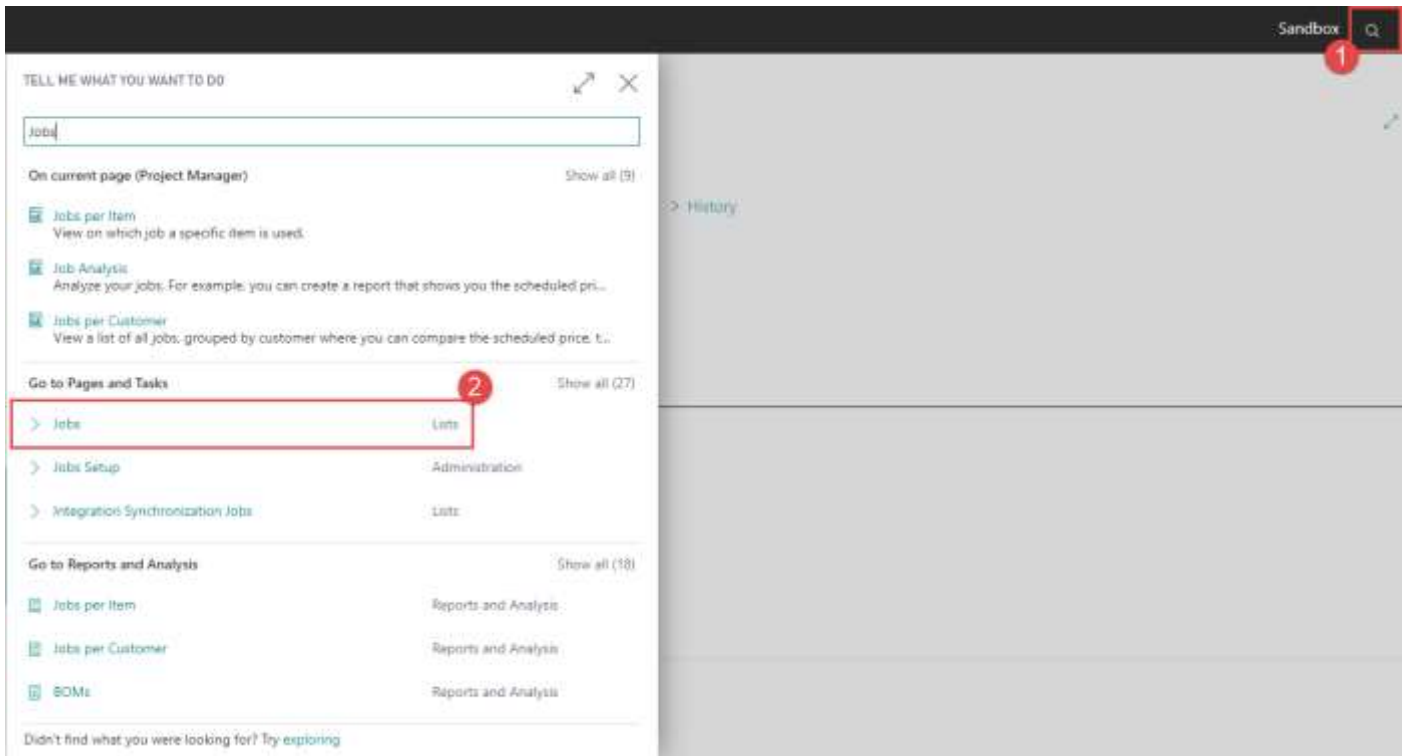


Tasks Tab

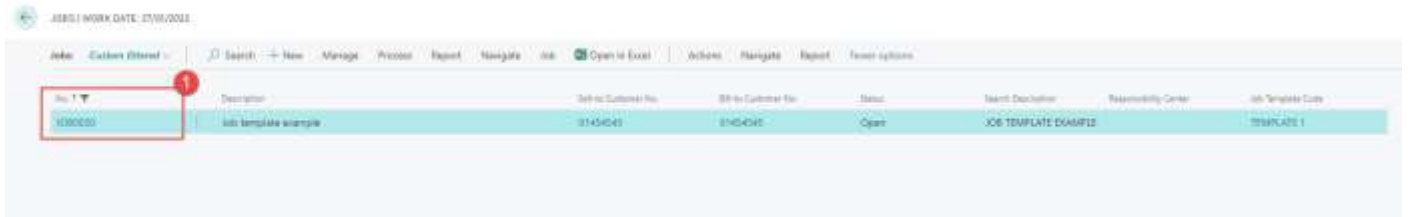
Field	Description
Job Invoice Template Code	Used to Select a Job Invoice Template Code. The selected Job Invoice Template Code will be applied to the Job Task when applying a Job Template to a Job. When Job Planning Lines are created for this Job Task in the Job, the Job Invoice Template Code from the Job Task will be automatically set on the Job Planning Line.

5.5 Applying a Job Invoice Template in a Job

Job Invoice Templates are applied in Job Planning Lines in a Job. First navigate to "Jobs" using the search function.



From the Job List select a Job No. to open a Job.



Prerequisites: To be able to apply a Job Invoice Template to a Job the following fields should be filled in the Job: Job Posting Group, Starting Date.

Posting Tab:

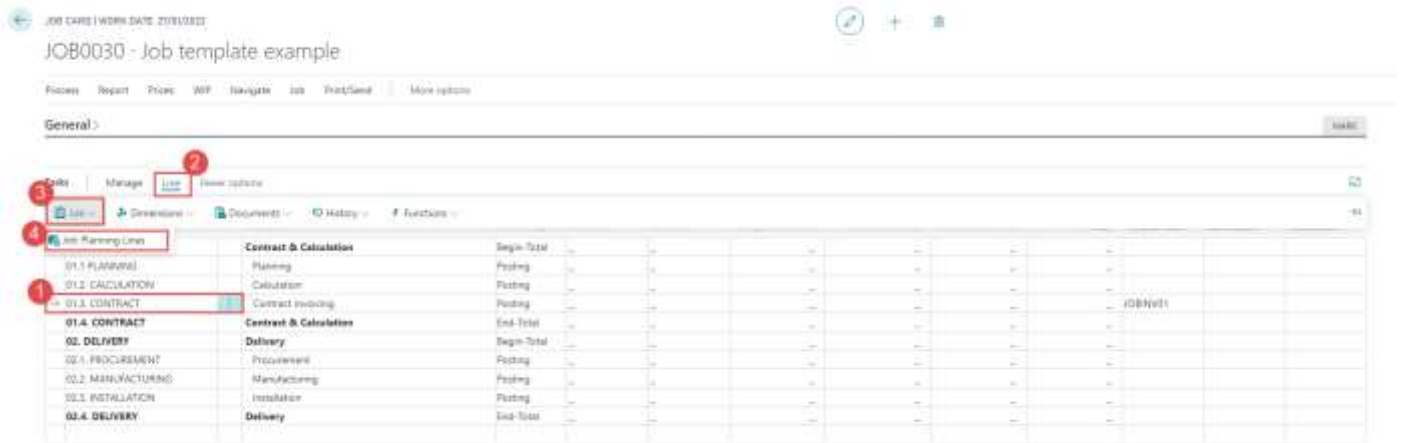
Field	Description
Job Posting Group	Applying a Job Invoice Template will create the terms set up in the invoice templates as Job Planning Lines of the "Billable" Line Type and as "G/L Account" Type. The G/L account with which the terms will be created is determined from the "G/L Expense Acc. (Contract)" field from the Job Posting Group. It's an important prerequisite that this field is set up in the Job Posting Group to be able to use Job Invoice Templates.

Code ↑	Resource Costs Applied Account	G/L Costs Applied Account	Job Costs Adjustment Account	G/L Expense Acc. (Contract)	WIP Accrued Sales Account	WIP Invoiced Sales Account	Job Sales Applied Account
→ SETTING UP	7480	7280	7181	6610	2211	2212	6190

Duration Tab:

Field	Description
Starting Date	Applying a Job Invoice Template will create the terms set up in the invoice templates as Job Planning Lines of the "Billable" Line Type and as "G/L Account" Type. The "Planning Date" field on the Job Planning Line determines on what date the term will be invoiced. The Starting Date field on the Job is used to set up the starting date of the contract. This date will be used to calculate the dates of each term using the Invoicing Date Formula from the Job Invoice Template.

Navigate to the Job Planning Lines of the Job Task for which you want to apply a Job Invoice Template



Job Invoice Templates are applied to a Job Planning Line of the “Budget” Line Type. This Job Planning Line will be used to determine the total contracted value of a project or contract. After applying a Job Invoice Template on this line the total contracted value will be divided over the terms according to the percentage set up per term in the Job Invoice Template. In the following example a contracted value of €12.000 will be divided evenly over 12 monthly terms for a contract starting on 1st of January.

A Job Planning Line defining the functions the contracted value for a project or contract should be set up as following:

Field	Description
Line Type	To set up a Job Planning Line to define the contracted value the “Budget” Line Type should be applied. Job Invoice Templates can only be applied to this Line Type.
Type	To set up a Job Planning Line to define the contracted value the “G/L Account” Type should be applied. Job Invoice Templates can only be applied to this Type.
No.	A G/L Account No. must be selected in this field. Please note that this Job Planning Line and this G/L Account will only be used to determine the contracted value. No actual posting will be done for this G/L account from this Job Planning Line. It is a best practice to set up a dedicated G/L account to determine contracted values to be able to apply Job Invoice Templates.
Quantity	This field must be filled to calculate the “Line Amount” field for the Job Planning Line. You can use this field in combination with the “Unit Price” field to make a calculation for the “Line Amount” field. The Line Amount will be used to divide the contracted value among the terms.
Unit Price	This field must be filled to calculate the “Line Amount” field for the Job Planning Line. You can use this field in combination with the “Quantity” field to make a calculation for the “Line Amount” field. The Line Amount will be used to divide the contracted value among the terms.
Job Invoice Template Code	Select a Job Invoice Template Code to set up which Job Invoice Template will be applied to the Job Planning Line.

← JOB0030 JOB TEMPLATE EXAMPLE 01.3. CONTRACT CONTRACT INVOICING | WORK DATE: 27/01/2022

Job Planning Lines | Search | + New | Edit List | Delete | Process | Report | Open in Excel | Actions | Navigate | Report | Fewer options

Job Task No. T	Line Type	Planning Date	Planned Delivery Date	Type	No.	Description	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount	Job Invoice Template Code
→ 01.3. CONTRACT	Budget	01/01/2021	01/01/2021	G/L Account	999999	Project Contracts	1	0.00	0.00	12,000.00	12,000.00	JOBINV02

To apply a Job Invoice Template to the contract value line first select the Job Planning Line and then select the “Apply Job Invoice Template” function

← JOB0030 JOB TEMPLATE EXAMPLE 01.3. CONTRACT CONTRACT INVOICING | WORK DATE: 01/01/2021

Job Planning Lines | Search | + New | Edit List | Delete | Process | Report | Open in Excel | **Actions** | Navigate | Report | Fewer options

Functions

- Create Job Journal Lines
- Open Job Journal
- Create Sales Invoice...
- Create Sales Credit Memo...
- Sales Invoices/Credit Memos...
- Reserve...
- Order Tracking
- Demand Overview
- Apply Job Invoice Template**
- Recalculate Schedule
- Apply Job Line Date Filter

Line Type	Planning Date	Delivery Date	Type	No.	Description	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount	Job Invoice Template Code
Budget	01/01/2021	01/01/2021	G/L Account	999999	Project Contracts	1	0.00	0.00	12,000.00	12,000.00	JOBINV02

After applying the Job Invoice Template the terms should be created a Job Planning Lines of the “Billable” type

← JOB0030 JOB TEMPLATE EXAMPLE 01.3. CONTRACT CONTRACT INVOICING | WORK DATE: 01/01/2021

Job Planning Lines | Search | + New | Edit List | Delete | Process | Report | Open in Excel | Actions | Navigate | Report | Fewer options

Job Task No. T	Line Type	Planning Date	Planned Delivery Date	Type	No.	Description	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount	Job Invoice Template Code
→ 01.3. CONTRACT	Budget	01/01/2021	01/01/2021	G/L Account	999999	Project Contracts	1	0.00	0.00	12,000.00	12,000.00	JOBINV02
01.3. CONTRACT	Billable	01/01/2021	01/01/2021	G/L Account	6610	January	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/02/2021	01/02/2021	G/L Account	6610	February	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/03/2021	01/03/2021	G/L Account	6610	March	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/04/2021	01/04/2021	G/L Account	6610	April	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/05/2021	01/05/2021	G/L Account	6610	May	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/06/2021	01/06/2021	G/L Account	6610	June	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/07/2021	01/07/2021	G/L Account	6610	July	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/08/2021	01/08/2021	G/L Account	6610	August	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/09/2021	01/09/2021	G/L Account	6610	September	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/10/2021	01/10/2021	G/L Account	6610	October	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/11/2021	01/11/2021	G/L Account	6610	November	1	0.00	0.00	1,000.00	1,000.00	JOBINV02
01.3. CONTRACT	Billable	01/12/2021	01/12/2021	G/L Account	6610	December	1	0.00	0.00	1,000.00	1,000.00	JOBINV02

Note: If you want to re-apply the invoice template you need to delete the Billable Job Planning Lines created by the Job Invoice Template. To do this you must clear the “Job Invoice Template Code” field for each Billable Job Invoice Template. This can only be done for Job Planning Lines which haven’t been invoiced yet.

Influence of Work Date when applying a Job Invoice Template

The Work Date has influence on the behavior of applying Job Invoice Templates. When a term is calculated in the past relative to the work date of the user the "Planning Date" of the Job Planning Line for the term will be set equal to the work date. Example:

Starting Date of the Job = 01/01/2021

Work Date of the Job = 01/06/2021 (1st of June)

When applying the Job Invoice Template in this situation the following message will occur notifying the user some Job Planning Lines are calculated in the past relative to the Work Date:

i

At least one calculated Planning Date was before 01/06/21.
Planning Dates should be checked and corrected when necessary.

OK

The terms will be calculated as following:

JOB0000 JOB TEMPLATE EXAMPLE (1) CONTRACT CONTRACT INVOICING | WORK DATE: 01/06/2021

Job Planning Lines | Search | + New | Edit List | Delete | Process | Report | Open in Excel | Actions | Navigate | Report | Fewer options

Job Task No. 1	Line Type	Planning Date	Planned Delivery Date	Type	No.	Description	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount	Job Invoice Template Code	Use...
01.3. CONTRACT	Budget	01/01/2021	01/01/2021	G/L Account	999999	Project Contracts	1	0.00	0.00	12,000.00	12,000.00	JOBINV02	<input checked="" type="checkbox"/>
01.3. CONTRACT	Billable	01/06/2021	01/06/2021	G/L Account	6610	January	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/06/2021	01/06/2021	G/L Account	6610	February	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/06/2021	01/06/2021	G/L Account	6610	March	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/06/2021	01/06/2021	G/L Account	6610	April	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/06/2021	01/06/2021	G/L Account	6610	May	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/06/2021	01/06/2021	G/L Account	6610	June	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/07/2021	01/07/2021	G/L Account	6610	July	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/08/2021	01/08/2021	G/L Account	6610	August	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/09/2021	01/09/2021	G/L Account	6610	September	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/10/2021	01/10/2021	G/L Account	6610	October	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/11/2021	01/11/2021	G/L Account	6610	November	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>
01.3. CONTRACT	Billable	01/12/2021	01/12/2021	G/L Account	6610	December	1	0.00	0.00	1,000.00	1,000.00	JOBINV02	<input type="checkbox"/>

The terms before 1st of June will be set equal to the Work Date in this scenario. This is done because these terms should have already been invoiced according to the Starting Date for this Job (1st of January). The user must decide what to do with these lines in this situation, i.e.: Invoice them retroactively or delete the lines so they won't be invoiced.

5.5.1 Recalculating a invoicing/billing schedule

After applying a Job Invoice Template the conditions and values of the terms can be recalculated. In addition, the contracted value can be increased and divided among the remaining to be invoiced lines.

From the Job Planning Lines first select the Job Planning Line of the "Budget" type for which you have set up the contracted value. Then select the "Recalculate Schedule" function.

Manage Apply Recalculation

EDIT - RECALCULATE SCHEDULE

GENERAL

Total Line Amount	<input type="text" value="12,000.00"/>	Remaining Percentage	<input type="text" value="91.67"/>
Extra Line Amount	<input type="text" value="0.00"/>	Line Amount (Assigned)	<input type="text" value="11,000.00"/>
Posted Line Amount	<input type="text" value="1,000.00"/>	Percentage (Assigned)	<input type="text" value="91.67"/>
Posted Percentage	<input type="text" value="8.33"/>	Remainder to last line	<input checked="" type="checkbox"/>
Remaining Line Amount	<input type="text" value="11,000.00"/>		

Planning Date	Percentage	Unit Price	Description
→ 01/06/2021	8.333333333333333	1,000.00	February
01/06/2021	8.333333333333333	1,000.00	March
01/06/2021	8.333333333333333	1,000.00	April
01/06/2021	8.333333333333333	1,000.00	May
01/06/2021	8.333333333333333	1,000.00	June
01/07/2021	8.333333333333333	1,000.00	July
01/08/2021	8.333333333333333	1,000.00	August
01/09/2021	8.333333333333333	1,000.00	September
01/10/2021	8.333333333333333	1,000.00	October
01/11/2021	8.333333333333333	1,000.00	November
01/12/2021	8.333333333333333	1,000.00	December

In the Recalculate Schedule page the to be invoiced Job Planning lines generated from a Job Invoice Template can be recalculated. This view shows only Job Planning Lines that are not yet already invoiced.

Field	Description
Total Line Amount	Shows the total Line Amount of the budget line for which a Job Invoice Template has been applied.
Extra Line Amount	Used to add (positive or negative) an extra amount to the Total Line Amount. The When an amount is added in this field the "Percentage" for each open term and "Unit Price" for each open term will be recalculated. Note that the recalculations will only be applied definitively when selecting the "Apply Recalculation" function.
Posted Line Amount	Shows the total Line Amount which has already been invoiced for this schedule.
Posted Percentage	Shows the total Posted Percentage which has already been invoiced for this schedule.
Remaining Line Amount	Shows the total Remaining Line Amount that has yet to be invoiced for this schedule.

Remaining Percentage	Shows the total Remaining Percentage that has yet to be invoiced for this schedule.
Line Amount (Assigned)	Shows the Line Amount that is currently assigned after making manual changes relative to the Remaining Line Amount.
Percentage (Assigned)	Shows the Percentage that is currently assigned after making manual changes relative to the remaining Percentage.
Remainder to last line	Used to determine whether rounding differences should be applied to the last line the make sure the values in the recalculations are complete.
Planning Date	Shows the Planning Date for the term in the schedule.
Percentage	Shows the Percentage for the term in the schedule. You can edit this percentage to apply changes to the schedule.
Unit Price	Shows the Unit Price for the term in the schedule. You can edit this amount to apply changes to the schedule.
Description	Shows the description for the term in the schedule.

After making changes in the Recalculate Schedule page the "Apply Recalculation" function can be used to apply the changes to the Job Planning Lines.

Manage Apply Recalculation 1

EDIT - RECALCULATE SCHEDULE ↗

GENERAL

Total Line Amount	12,000.00	Remaining Percentage	91.67
Extra Line Amount	0.00	Line Amount (Assigned)	11,000.00
Posted Line Amount	1,000.00	Percentage (Assigned)	91.67
Posted Percentage	8.33	Remainder to last line	<input checked="" type="checkbox"/>
Remaining Line Amount	11,000.00		

Planning Date	Percentage	Unit Price	Description
→ 01/06/2021	8.333333333333333	1,000.00	February
01/06/2021	8.333333333333333	1,000.00	March
01/06/2021	8.333333333333333	1,000.00	April
01/06/2021	8.333333333333333	1,000.00	May
01/06/2021	8.333333333333333	1,000.00	June
01/07/2021	8.333333333333333	1,000.00	July
01/08/2021	8.333333333333333	1,000.00	August
01/09/2021	8.333333333333333	1,000.00	September
01/10/2021	8.333333333333333	1,000.00	October
01/11/2021	8.333333333333333	1,000.00	November
01/12/2021	8.333333333333333	1,000.00	December

Closing the Recalculate Schedule page will discard your changes.

6. COMBINED INVOICES

6.1 Description and objective

The Combined Invoices functionality makes it possible to create Sales Invoices and Sales Credit Memo's in batch and Combine billable Job Planning Lines in Sales Invoices and Sales Credit Memo's on the following Combine Levels:

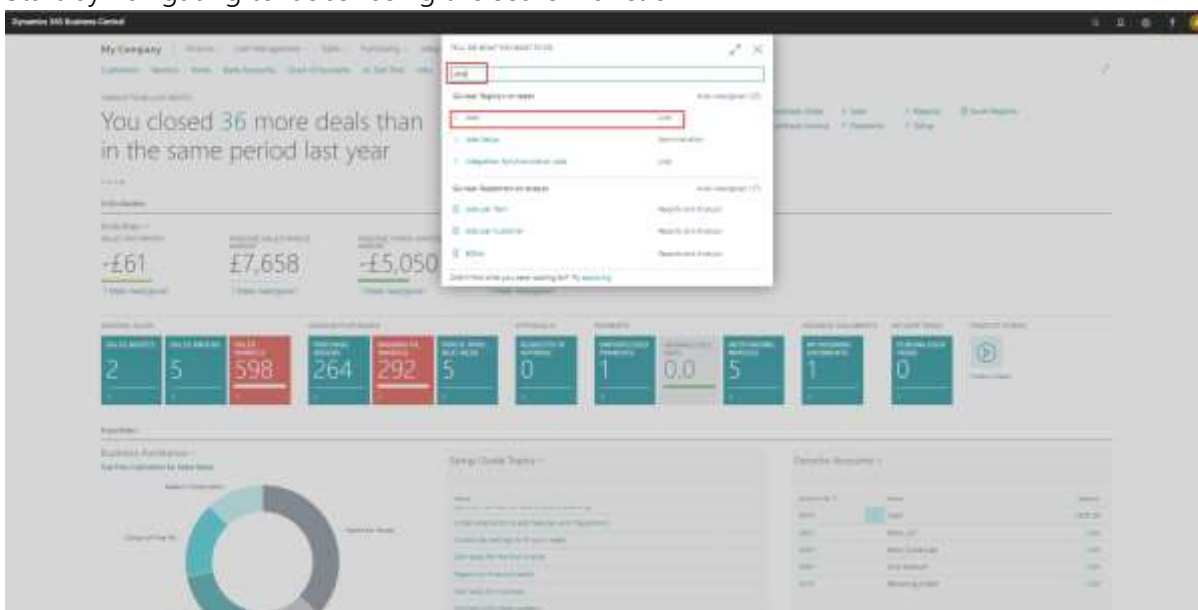
- Sell-to Customer: Invoices or Credit Memo's will be combined on Sell-to Customer No. Planning Lines with the same Sell-to Customer No. will be combined in one invoice or credit memo.
- Bill-to Customer: Invoices or Credit Memo's will be combined on Bill-to Customer No. Planning Lines with the same Bill-to Customer No. will be combined in one invoice or credit memo.
- Job: Invoices or Credit Memo's will be combined on Job No. Planning Lines with the same Job No. will be combined in one invoice or credit memo.
- Ship-to Code: Invoices or Credit Memo's will be combined on Ship-to Code. Planning Lines with the same Ship-to Code will be combined in one invoice or credit memo.

6.2 Combine Job Sales Invoices

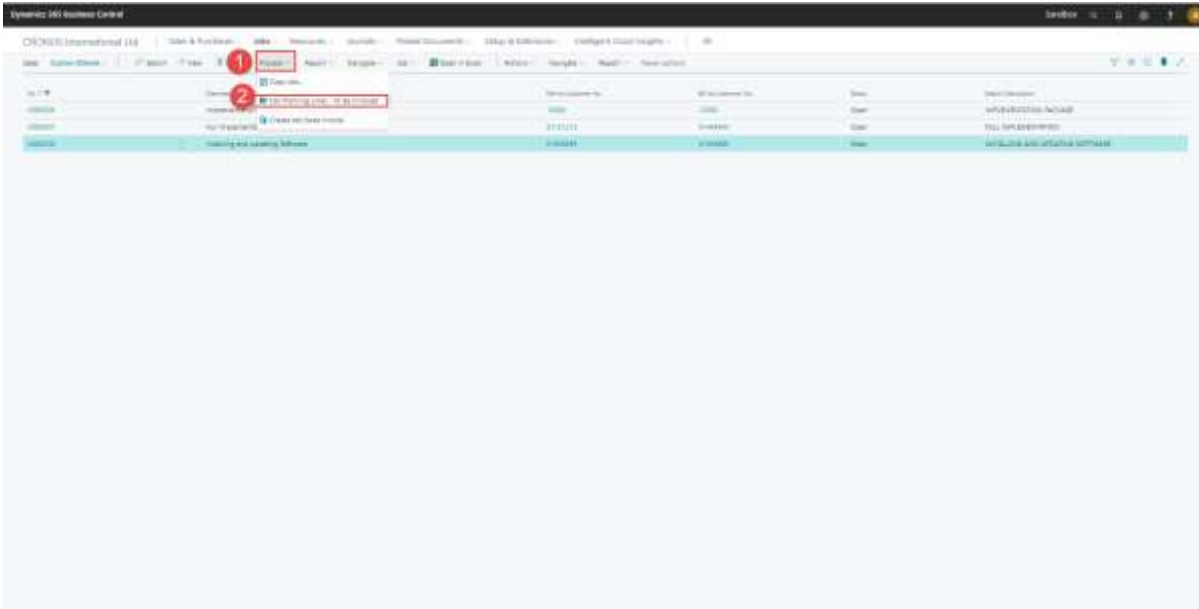
The Project Template – Combine Invoices app introduces the Job Planning Lines – to be invoiced overview to create invoices and credit memo's in. In this page all the 'billable' and 'budget and billable' Job Planning Lines which can be invoiced are displayed (Job Planning Lines which have a quantity to invoice not equal to zero).

This page is available on the Jobs list page.

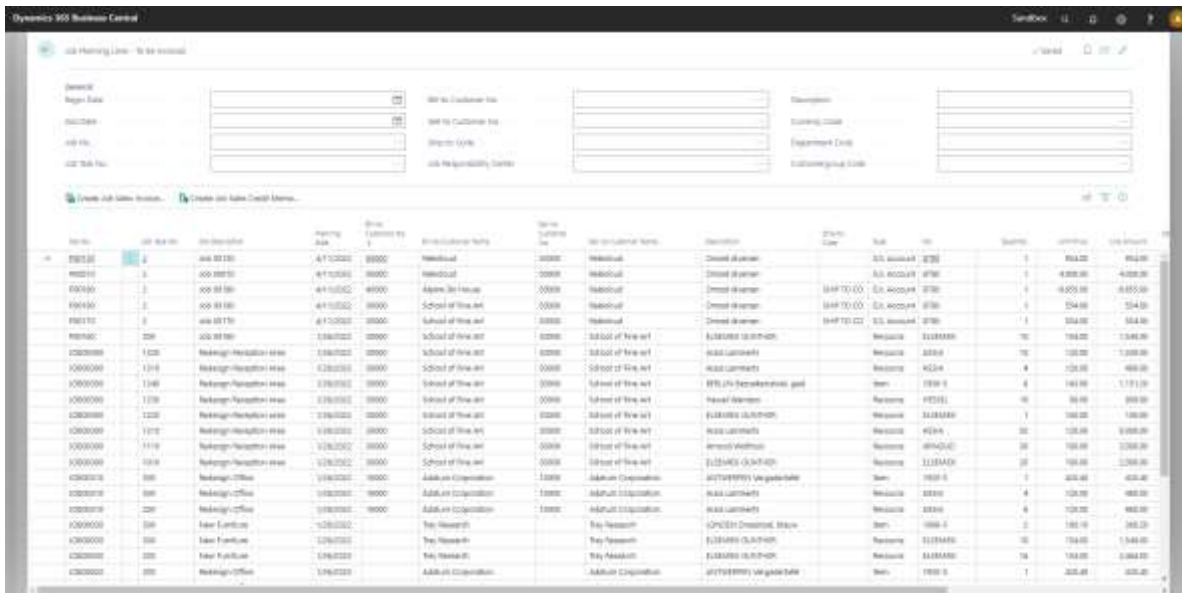
Start by navigating to "Jobs" using the search function



Select the 'Job Planning Lines – to be invoiced' page by selecting "Process" and then selecting "Job Planning Lines – to be invoiced".



In this page filters are displayed to be able to filter on the Job Planning Lines you want to invoice in batch. The page only shows Job Planning Lines of the "Billable" and "Budget and Billable" Line Type. Filters can be added to the page for the following fields.



Field	Description
Begin Date	Used to specify the start of the date range to filter on the Planning date of the Job Planning Lines. With this field the planning lines for a specific planning date range can be filtered.
End Date	Used to specify the end of the date range to filter on the Planning date of the Job Planning Lines. With this field the planning lines for a specific planning date range can be filtered.
Job No.	Used to filter Job Planning Lines on Job No. With this field the planning lines can be filtered on a specific job.
Job Task No.	Used to filter Job Planning Lines on Job Task No. With this field the planning lines can be filtered on a specific job task.
Bill-to Customer No.	Used to filter Job Planning Lines on Bill-to Customer No. With this field the planning lines can be filtered on a specific Bill-to Customer.
Sell-to Customer No.	Used to filter Job Planning Lines on Sell-to Customer No. With this field the planning lines can be filtered on a specific Sell-to Customer.
Ship-to Code	Used to filter Job Planning Lines on Ship-to Code. With this field the planning lines can be filtered on a specific Ship-to Code.
Description	Used to filter Job Planning Lines on the Description. With this field the planning lines can be filtered on a specific description or part of a description.
Currency Code	Used to filter Job Planning Lines on Currency Code. With this field the planning lines can be filtered on a specific currency.
Global Dimension 1 Code	Used to filter Job Planning Lines on Global Dimension 1 Code. With this field the planning lines can be filtered on a specific global dimension.
Global Dimension 2 Code	Used to filter Job Planning Lines on Global Dimension 2. With this field the planning lines can be filtered on a specific global dimension.

After filtering the 'Job Planning Lines – to be invoiced' it's possible to create invoices in batch for all lines within the filter or to make a more specific selection by selecting the lines that need to be invoiced.

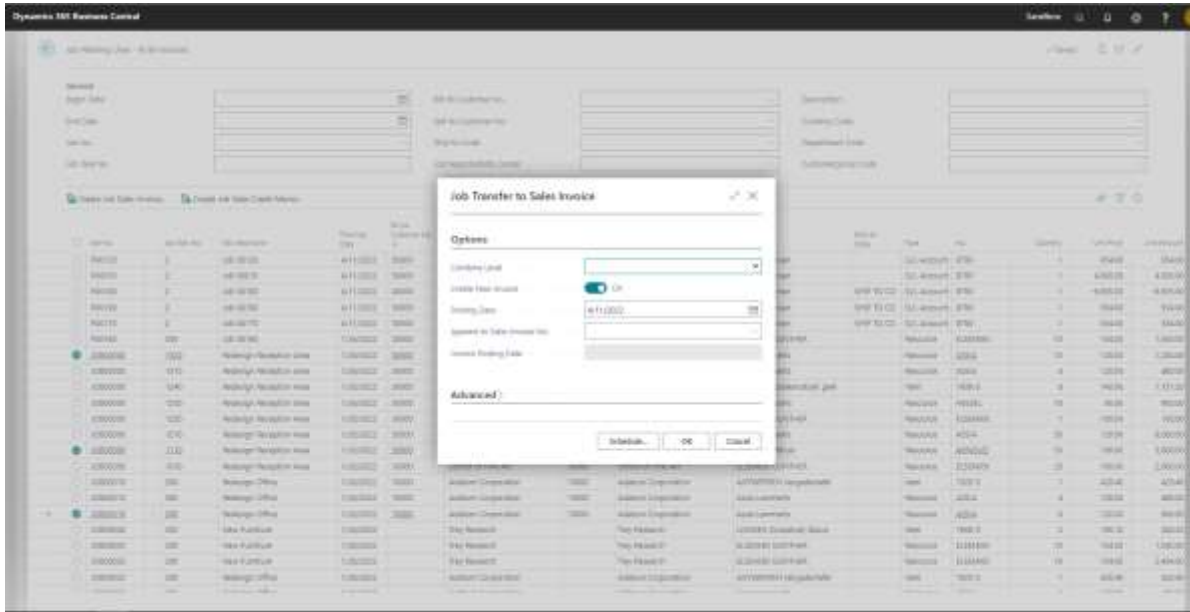
A selection can be made by marking the checkboxes on the Job Planning Lines.

The screenshot shows the 'Job Orders' page in Dynamics 365 Business Central. At the top, there are several filter fields: 'Page Date', 'Job Date', 'Job No.', 'Job Sub No.', 'Mfg. Customer No.', 'Mfg. Customer No.', 'Mfg. To Code', 'Mfg. To Code', 'Mfg. Responsibility Center', 'Description', 'Company Code', 'Department Code', and 'Controlling Code'. Below the filters, there are two buttons: 'Filter Job Order Items...' and 'Create Job Order Credit Memo...'. The main area contains a table with columns: 'Job No.', 'Job Sub No.', 'Job Description', 'Posting Date', 'Mfg. Customer No.', 'Mfg. Customer Name', 'Mfg. Customer No.', 'Mfg. Customer Name', 'Description', 'Mfg. To Code', 'Mfg. To Code', 'Quantity', 'Unit Price', and 'Line Amount'. The table lists various job orders, including 'New Furniture' and 'New Partials', with their respective dates and amounts.

After setting a filter and/or making a selection the "Create Sales Invoices" function can be used to create invoices in batch for the lines within the filter or within the selection.

The screenshot shows the 'Job Transfer to Invoice' page in Dynamics 365 Business Central. The layout is identical to the previous screenshot, but the 'Create Job Order Invoice' button is highlighted with a red box. This button is used to create sales invoices in batch for the selected job order lines.

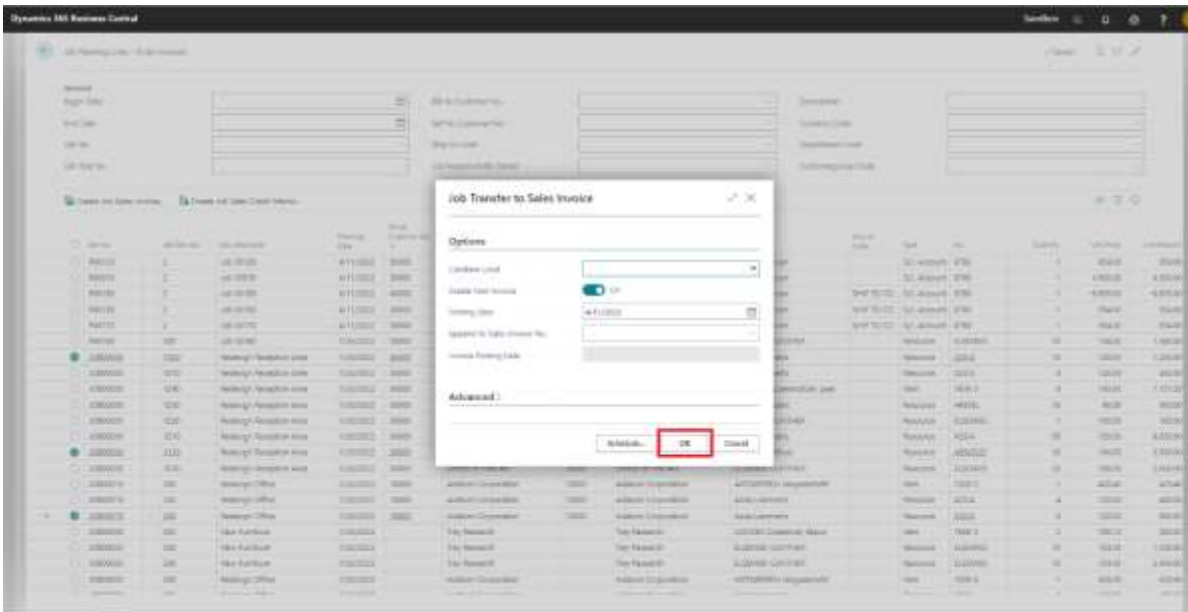
This will open the "Job Transfer to Invoice" Page.



In this page you can determine under which condition the invoices will be combined.

Field	Description
Combine Level	<p>Specifies the Combine Level when creating job sales invoices. The combine level determines how job planning lines will be combined in the sales invoiced which will be created.</p> <ul style="list-style-type: none"> • Sell-to Customer: Invoices will be combined on Sell-to Customer No. Planning Lines with the same Sell-to Customer No. within the filter/selection will be combined in one invoice. • Bill-to Customer: Invoices will be combined on Bill-to Customer No. Planning Lines with the same Bill-to Customer No. within the filter/selection will be combined in one invoice. • Ship-to Code: Invoices or Credit Memo's will be combined on Ship-to Code. Planning Lines with the same Ship-to Code will be combined in one invoice or credit memo. • Job: Invoices will be combined on Job No. Planning Lines with the same Job No. within the filter/selection will be combined in one invoice.
Create New Invoice	Specifies if the batch job creates new Sales Invoices.
Posting Date	Specifies the posting date for the sales invoice which will be created.
Append to Sales Invoice No.	Specifies the number of the sales invoice that you want to append the lines to if you did not select the Create New Invoice field.
Invoice Posting Date	Specifies the Invoice Posting Date if you selected the Append to Sales Invoice No. field. Shows the posting date of the Sales Invoice you want to append the planning lines to.

After setting the correct conditions in the “Job Transfer to Sales Invoice” page select “OK” to create the Sales Invoices in batch.

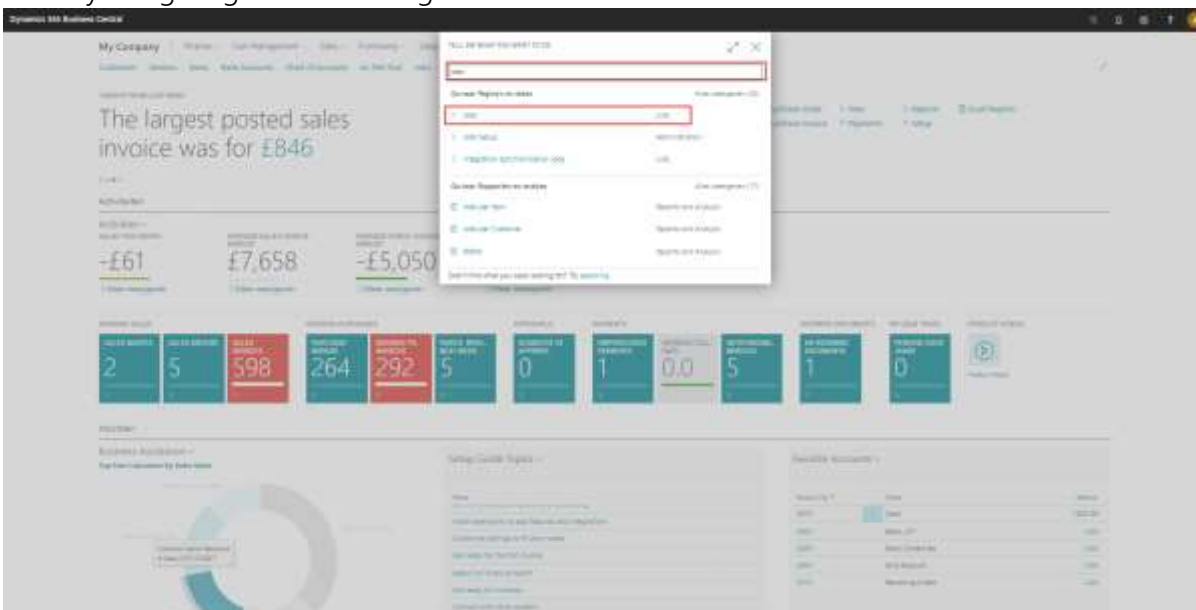


6.3 Combine Job Sales Credit Memo's

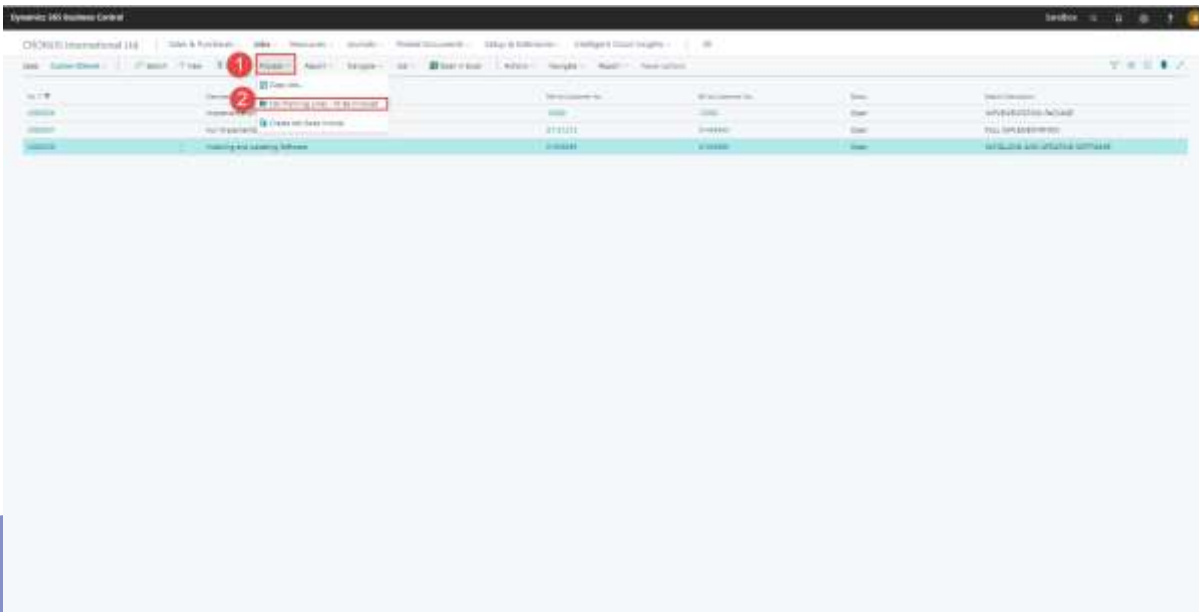
The Project Template – Combine Invoices app introduces the Job Planning Lines – to be invoiced overview to create invoices and credit memo's. In this page all the 'billable' and 'budget and billable' Job Planning Lines which can be invoiced are displayed (Job Planning Lines which have a quantity to invoice not equal to zero).

This page is available on the Jobs list page.

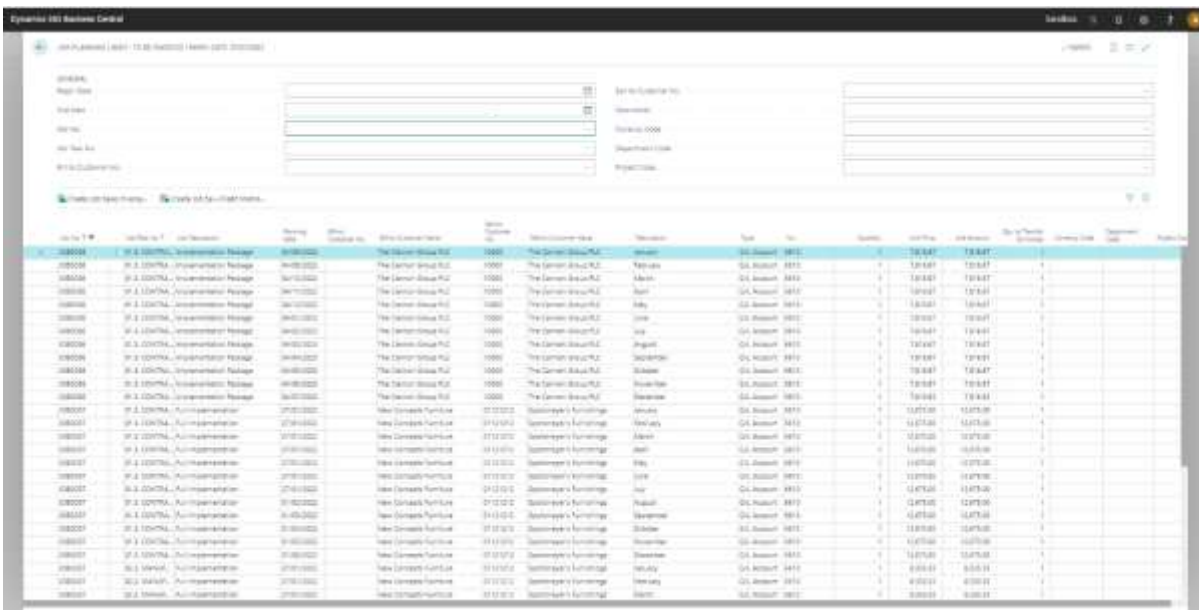
Start by navigating to “Jobs” using the search function



Select the 'Job Planning Lines – to be invoiced' page by selecting "Process" and then selecting "Job Planning Lines – to be invoiced".



In this page filters are displayed to be able to filter on the Job Planning Lines you want to invoice in batch. The page only shows Job Planning Lines of the "Billable" and "Budget and Billable" Line Type. Filters can be added to the page for the following fields.



Field	Description
Begin Date	Used to specify the start of the date range to filter on the Planning date of the Job Planning Lines. With this field the planning lines for a specific planning date range can be filtered.
End Date	Used to specify the end of the date range to filter on the Planning date of the Job Planning Lines. With this field the planning lines for a specific planning date range can be filtered.
Job No.	Used to filter Job Planning Lines on Job No. With this field the planning lines can be filtered on a specific job.
Job Task No.	Used to filter Job Planning Lines on Job Task No. With this field the planning lines can be filtered on a specific job task.
Bill-to Customer No.	Used to filter Job Planning Lines on Bill-to Customer No. With this field the planning lines can be filtered on a specific Bill-to Customer.
Sell-to Customer No.	Used to filter Job Planning Lines on Sell-to Customer No. With this field the planning lines can be filtered on a specific Sell-to Customer.
Ship-to Code	Used to filter Job Planning Lines on Ship-to Code. With this field the planning lines can be filtered on a specific Ship-to Code.
Description	Used to filter Job Planning Lines on the Description. With this field the planning lines can be filtered on a specific description or part of a description.
Currency Code	Used to filter Job Planning Lines on Currency Code. With this field the planning lines can be filtered on a specific currency.
Global Dimension 1 Code	Used to filter Job Planning Lines on Global Dimension 1 Code. With this field the planning lines can be filtered on a specific global dimension.
Global Dimension 2 Code	Used to filter Job Planning Lines on Global Dimension 2. With this field the planning lines can be filtered on a specific global dimension.

After filtering the 'Job Planning Lines – to be invoiced' it's possible to create credit memo's in batch for all lines within the filter or to make a more specific selection by selecting the lines that need to be invoiced.

A selection can be made by marking the checkboxes on the Job Planning Lines.



Dynamics 365 Business Central

Job Planning Lines - To Be Invoiced

General

Begin Date: [] Bill-to Customer No.: [] Description: []

End Date: [] Sell-to Customer No.: [] Currency Code: []

Job No.: [] Ship-to Code: [] Department Code: []

Job Task No.: [] Job-Responsibility Center: [] Customergroup Code: []

Create Job Sales Invoice... Create Job Sales Credit Memo...

Job No.	Job Task No.	Job Description	Planning Date	Bill-to Customer No.	Bill-to Customer Name	Sell-to Customer No.	Sell-to Customer Name	Description	Ship-to Code	Type	No.	Quantity	Unit Price	Line Amount
P00120	2	Job 00120	4/11/2022	50000	Relecloud	50000	Relecloud	Omzet diversen		G/L Account	8780	1	954.00	954.00
P00010	2	Job 00010	4/11/2022	50000	Relecloud	50000	Relecloud	Omzet diversen		G/L Account	8780	1	4,000.00	4,000.00
P00180	2	Job 00180	4/11/2022	40000	Alpine Ski House	50000	Relecloud	Omzet diversen	SHP TO CD	G/L Account	8780	1	-6,655.00	-6,655.00
P00190	2	Job 00190	4/11/2022	30000	School of Fine Art	50000	Relecloud	Omzet diversen	SHP TO CD	G/L Account	8780	1	354.00	354.00
P00170	2	Job 00170	4/11/2022	30000	School of Fine Art	50000	Relecloud	Omzet diversen	SHP TO CD	G/L Account	8780	1	354.00	354.00
P00160	300	Job 00160	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	ELSEMEX GUNTHER		Resource	ELSEMEX	10	154.00	1,540.00
J0600200	1320	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Assia Lammerts		Resource	ASSIA	10	120.00	1,200.00
J0600300	1310	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Assia Lammerts		Resource	ASSIA	4	120.00	480.00
J0600300	1340	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	BERLIN Bezekerkstraat, geel		Item	1890-S	8	143.80	1,151.00
J0600300	1230	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Hessel Wanders		Resource	HESSEL	10	90.00	900.00
J0600300	1220	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	ELSEMEX GUNTHER		Resource	ELSEMEX	1	100.00	100.00
J0600300	1210	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Assia Lammerts		Resource	ASSIA	30	125.00	3,750.00
J0600200	1310	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Arnoud Wothuis		Resource	ARNOLD	30	100.00	3,000.00
J0600300	1010	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	ELSEMEX GUNTHER		Resource	ELSEMEX	20	100.00	2,000.00
J0600310	300	Redesign Office	1/26/2022	10000	Adatum Corporation	10000	Adatum Corporation	ANTWERPEN Vergaderzaal		Item	1920-S	1	420.40	420.40
J0600310	300	Redesign Office	1/26/2022	10000	Adatum Corporation	10000	Adatum Corporation	Assia Lammerts		Resource	ASSIA	4	120.00	480.00
J0600310	200	Redesign Office	1/26/2022	10000	Adatum Corporation	10000	Adatum Corporation	Assia Lammerts		Resource	ASSIA	8	120.00	960.00
J0600300	300	New Furniture	1/26/2022		They Research		They Research	LONDEN Draaiboek, blauw		Item	1900-S	2	190.10	380.20
J0600300	300	New Furniture	1/26/2022		They Research		They Research	ELSEMEX GUNTHER		Resource	ELSEMEX	10	154.00	1,540.00
J0600300	200	New Furniture	1/26/2022		They Research		They Research	ELSEMEX GUNTHER		Resource	ELSEMEX	16	154.00	2,464.00
J0600300	300	Redesign Office	1/26/2022		Adatum Corporation		Adatum Corporation	ANTWERPEN Vergaderzaal		Item	1920-S	1	420.40	420.40

After setting a filter and/or making a selection the "Create Sales Credit Memo's" function can be used to create credit memo's in batch for the lines within the filter or within the selection.

Dynamics 365 Business Central

Job Planning Lines - To Be Invoiced

General

Begin Date: [] Bill-to Customer No.: [] Description: []

End Date: [] Sell-to Customer No.: [] Currency Code: []

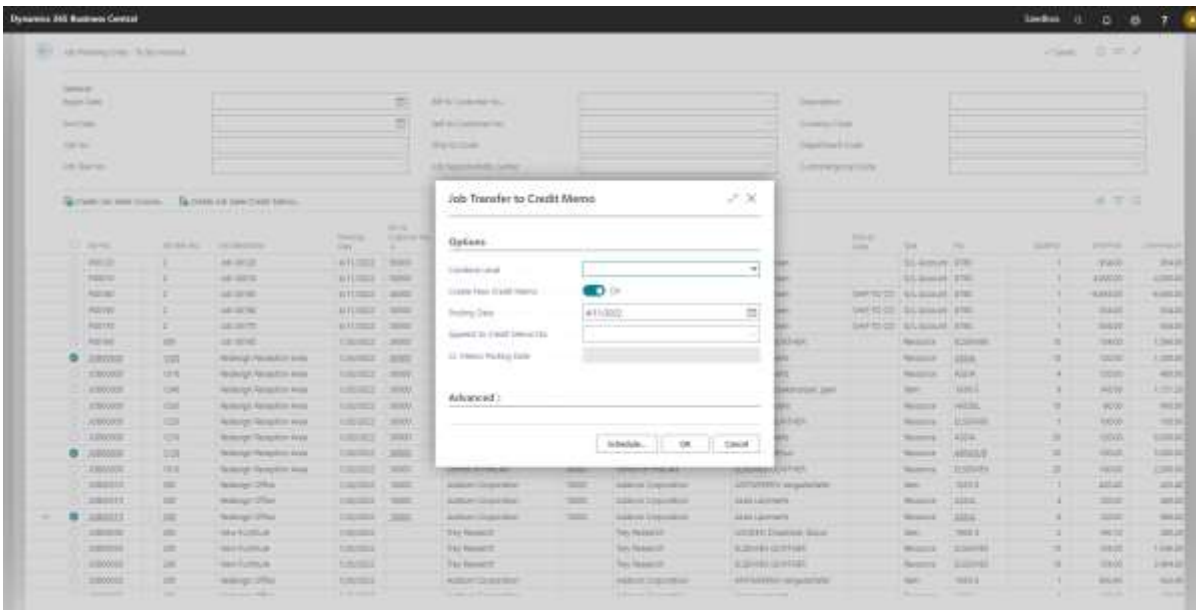
Job No.: [] Ship-to Code: [] Department Code: []

Job Task No.: [] Job-Responsibility Center: [] Customergroup Code: []

Create Job Sales Invoice... **Create Job Sales Credit Memo's**

Job No.	Job Task No.	Job Description	Planning Date	Bill-to Customer No.	Bill-to Customer Name	Sell-to Customer No.	Sell-to Customer Name	Description	Ship-to Code	Type	No.	Quantity	Unit Price	Line Amount
P00120	2	Job 00120	4/11/2022	50000	Relecloud	50000	Relecloud	Omzet diversen		G/L Account	8780	1	954.00	954.00
P00010	2	Job 00010	4/11/2022	50000	Relecloud	50000	Relecloud	Omzet diversen		G/L Account	8780	1	4,000.00	4,000.00
P00180	2	Job 00180	4/11/2022	40000	Alpine Ski House	50000	Relecloud	Omzet diversen	SHP TO CD	G/L Account	8780	1	-6,655.00	-6,655.00
P00190	2	Job 00190	4/11/2022	30000	School of Fine Art	50000	Relecloud	Omzet diversen	SHP TO CD	G/L Account	8780	1	354.00	354.00
P00170	2	Job 00170	4/11/2022	30000	School of Fine Art	50000	Relecloud	Omzet diversen	SHP TO CD	G/L Account	8780	1	354.00	354.00
P00160	300	Job 00160	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	ELSEMEX GUNTHER		Resource	ELSEMEX	10	154.00	1,540.00
J0600200	1320	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Assia Lammerts		Resource	ASSIA	10	120.00	1,200.00
J0600300	1310	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Assia Lammerts		Resource	ASSIA	4	120.00	480.00
J0600300	1340	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	BERLIN Bezekerkstraat, geel		Item	1890-S	8	143.80	1,151.00
J0600300	1230	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Hessel Wanders		Resource	HESSEL	10	90.00	900.00
J0600300	1220	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	ELSEMEX GUNTHER		Resource	ELSEMEX	1	100.00	100.00
J0600300	1210	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Assia Lammerts		Resource	ASSIA	30	125.00	3,750.00
J0600200	1310	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	Arnoud Wothuis		Resource	ARNOLD	30	100.00	3,000.00
J0600300	1010	Redesign Reception Area	1/26/2022	30000	School of Fine Art	30000	School of Fine Art	ELSEMEX GUNTHER		Resource	ELSEMEX	20	100.00	2,000.00
J0600310	300	Redesign Office	1/26/2022	10000	Adatum Corporation	10000	Adatum Corporation	ANTWERPEN Vergaderzaal		Item	1920-S	1	420.40	420.40
J0600310	300	Redesign Office	1/26/2022	10000	Adatum Corporation	10000	Adatum Corporation	Assia Lammerts		Resource	ASSIA	4	120.00	480.00
J0600310	200	Redesign Office	1/26/2022	10000	Adatum Corporation	10000	Adatum Corporation	Assia Lammerts		Resource	ASSIA	8	120.00	960.00
J0600300	300	New Furniture	1/26/2022		They Research		They Research	LONDEN Draaiboek, blauw		Item	1900-S	2	190.10	380.20
J0600300	300	New Furniture	1/26/2022		They Research		They Research	ELSEMEX GUNTHER		Resource	ELSEMEX	10	154.00	1,540.00
J0600300	200	New Furniture	1/26/2022		They Research		They Research	ELSEMEX GUNTHER		Resource	ELSEMEX	16	154.00	2,464.00
J0600300	300	Redesign Office	1/26/2022		Adatum Corporation		Adatum Corporation	ANTWERPEN Vergaderzaal		Item	1920-S	1	420.40	420.40

This will open the "Job Transfer to Credit Memo" Page.



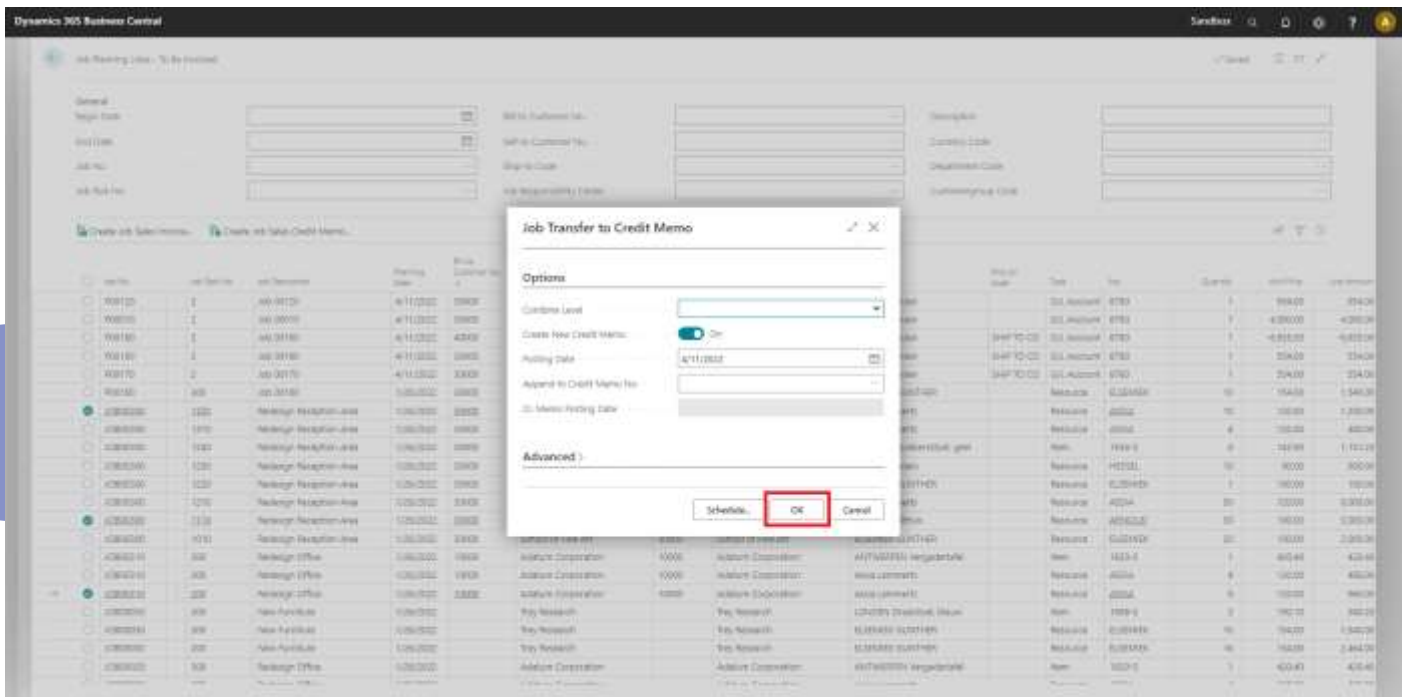
In this page you can determine under which condition the credit memo's will be combined.

Field	Description
Combine Level	<p>Specifies the Combine Level when creating job credit memo's. The combine level determines how job planning lines will be combined in the credit memo's which will be created.</p> <ul style="list-style-type: none"> • Sell-to Customer: Credit Memo's will be combined on Sell-to Customer No. Planning Lines with the same Sell-to Customer No. within the filter/selection will be combined in one Credit Memo. • Bill-to Customer: Credit Memo's will be combined on Bill-to Customer No. Planning Lines with the same Bill-to Customer No. within the filter/selection will be combined in one Credit Memo. • Ship-to Code: Invoices or Credit Memo's will be combined on Ship-to Code. Planning Lines with the same Ship-to Code will be combined in one invoice or credit memo. • Job: Credit Memo's will be combined on Job No. Planning Lines with the same Job No. within the filter/selection will be combined in one Credit Memo.
Create New Credit Memo's	Specifies if the batch job creates new Sales Credit Memo's
Posting Date	Specifies the posting date for the credit memo which will be created.
Append to Credit Memo's No.	Specifies the number of the credit memo that you want to append the lines to if you did not select the Create New Sales Credit Memo's field.



Cr. Memo Posting Date Specifies the Cr. Memo Posting Date if you selected the Append to Sales Credit Memo's No. field. Shows the posting date of the Cr. Memo you want to append the planning lines to.

After setting the correct conditions in the "Job Transfer to Credit Memo" page select "OK" to create the Sales Credit Memo's in batch.



7. DEPARTMENTS

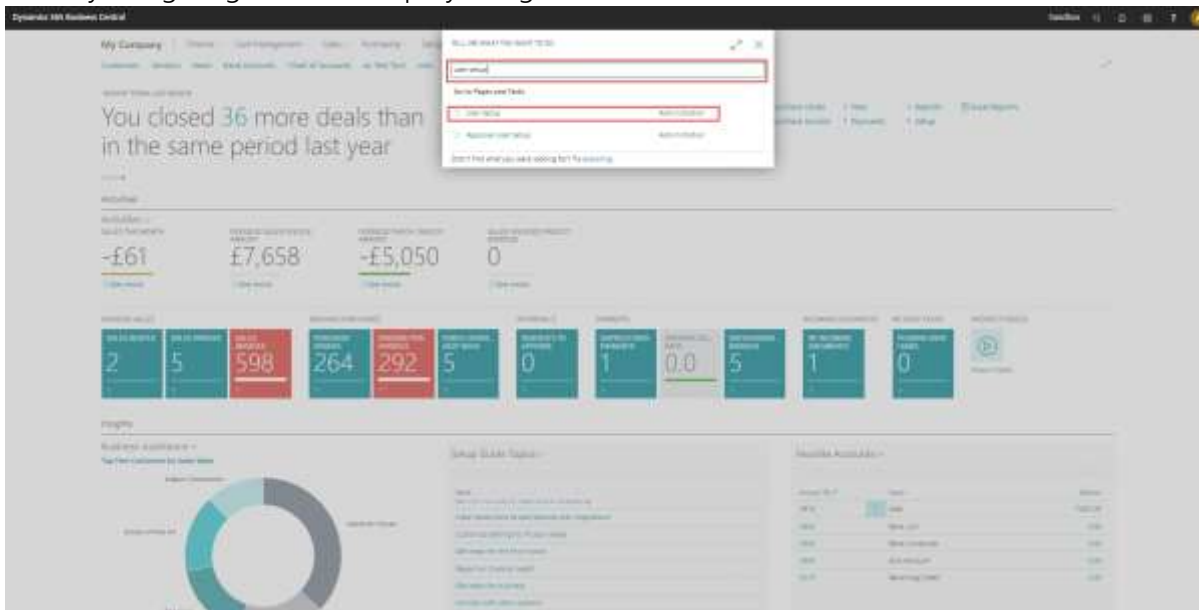
7.1 Description and objective

This functionality is designed for companies working with multiple departments or Responsibility Centers in which Jobs are managed. The functionality makes it possible to set up Responsibility Centers per user, to make sure the Job administration for each department is separated from each other. This makes sure users can only manage Jobs in Business Central that are set up for the Responsibility Center the user belongs to.

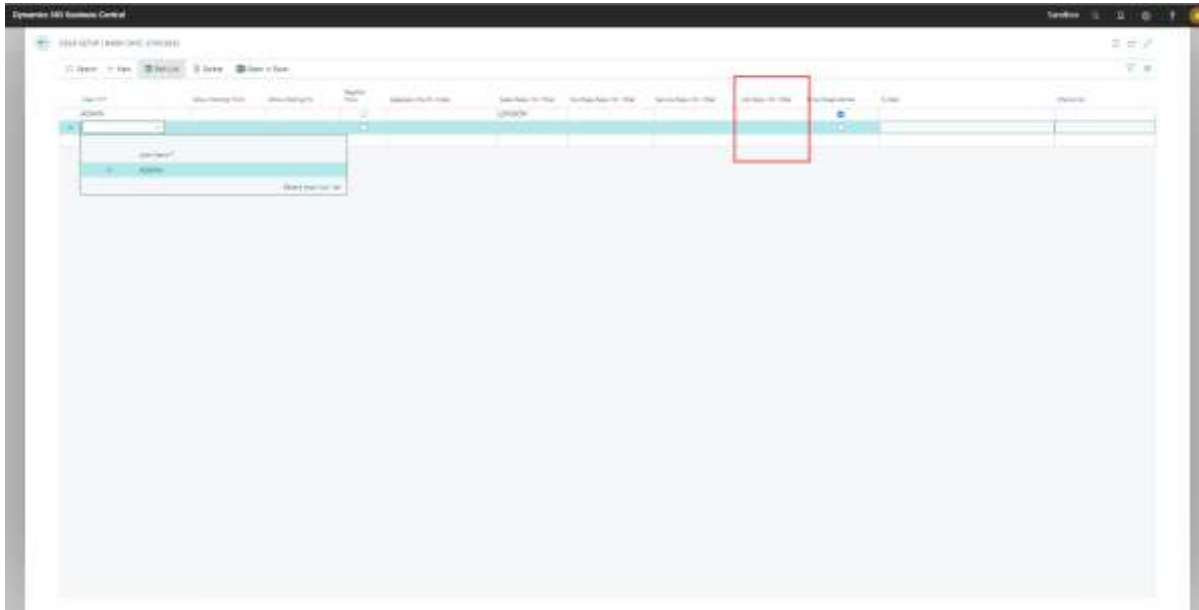
7.2 Setup Job Responsibility Center for a user

To setup a Job Responsibility Center Filter for a user the User Setup page is used to specify which user belongs to which Responsibility Center for Jobs.

Start by navigating to User Setup by using the Search function.



In the User Setup the Job Resp. Ctr. Filter field must be entered for each user you want to set up a Job Responsibility center for.



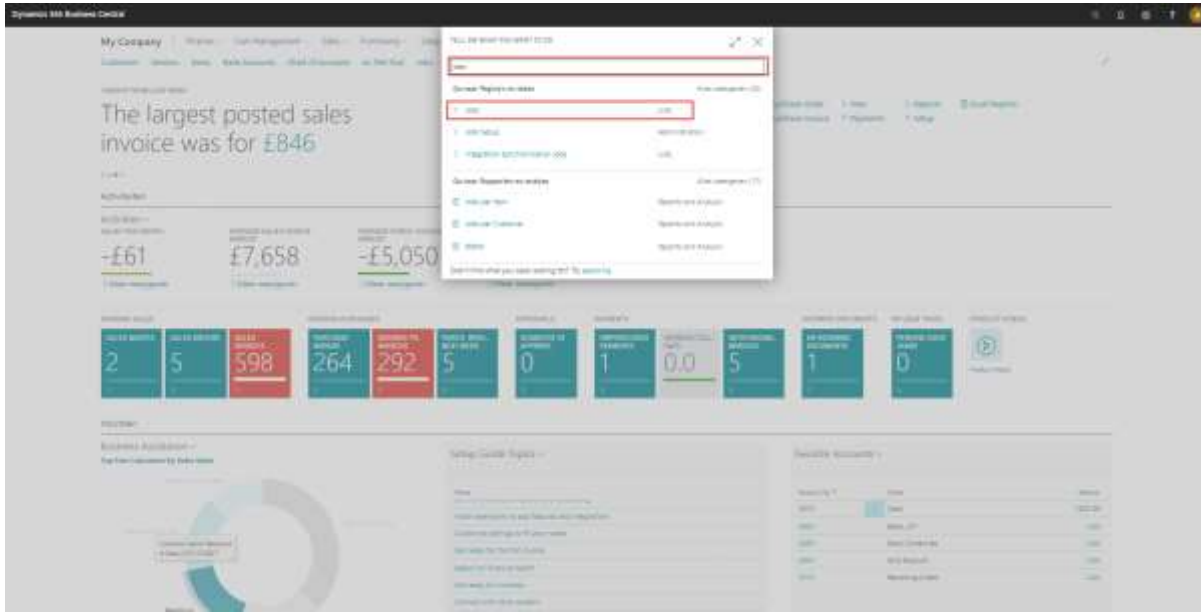
Enter a Responsibility Center in the field 'Job Resp. Ctr. Filter' to setup Job Responsibility Center for a user.

Field	Description
Job Resp. Ctr. Filter	Specifies the code for the Responsibility Center you want to assign to the user. The user will only be able to see Jobs for the responsibility center specified. This responsibility center will also be the default Responsibility Center when the user creates new Job documents.

Apply a Responsibility Center in Jobs

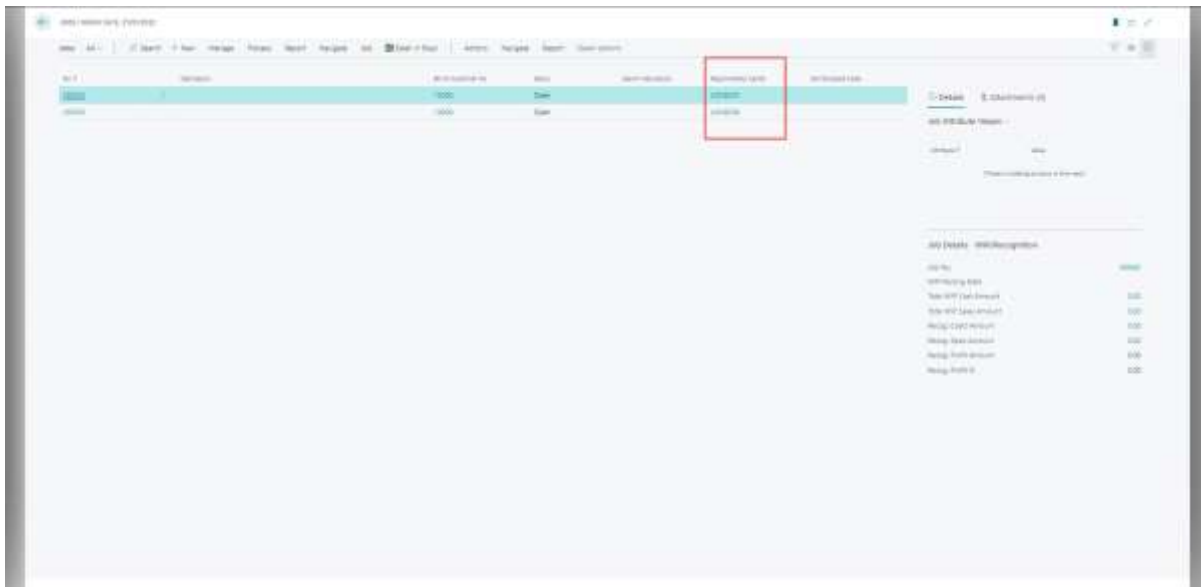
To be able to work with Responsibility Centers on Jobs, a Responsibility Center needs to be specified on Jobs. Therefore, the new field Responsibility Center is added to the general tab of a Job Card. There are several ways the functionality helps the user to set up the right Responsibility Center for a Job.

Start by navigating to Jobs using the search function.



Responsibility Center Filter

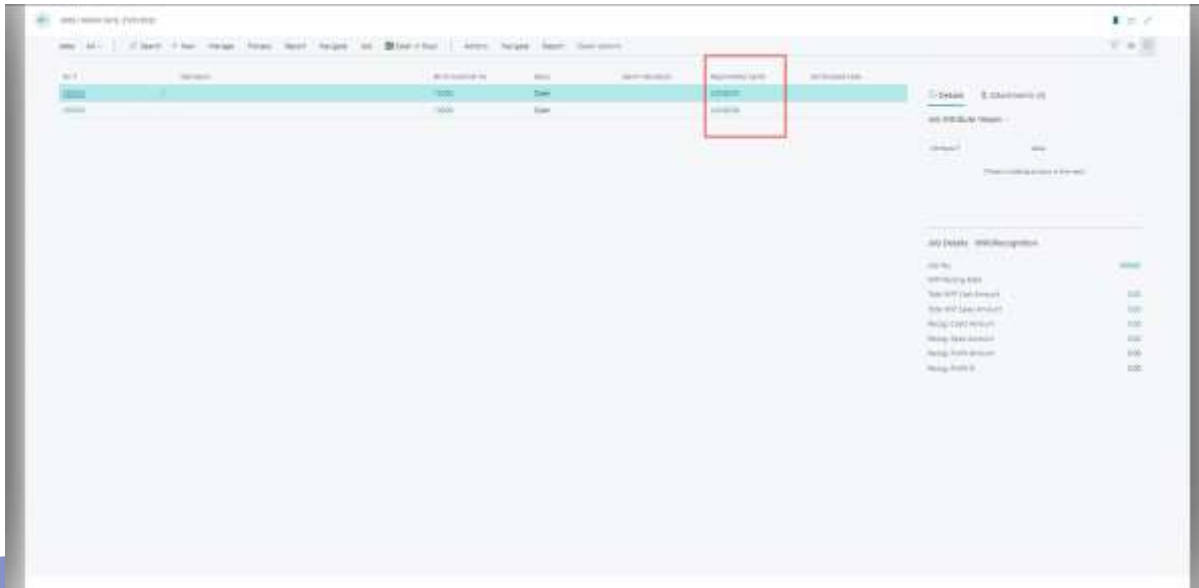
When having a Responsibility Center set up to your user the Job List in automatically filtered showing only the Jobs with the same Responsibility Center as the User Setup.



This filter cannot be removed by the user.

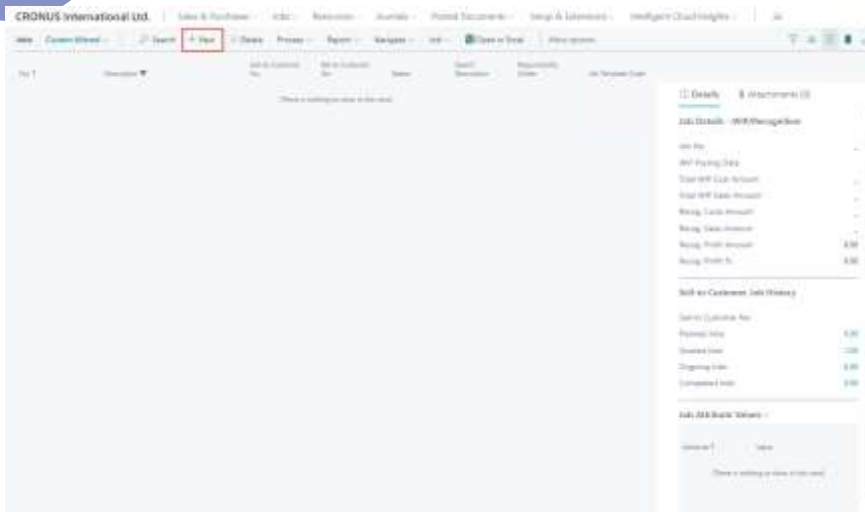
Note: Whenever the Job Responsibility Center Filter for the user isn't set up, the user can see all the Jobs and the Job list page won't be filtered.

The Responsibility Center field is added to the Job List to see which Jobs belong to which Responsibility Center.

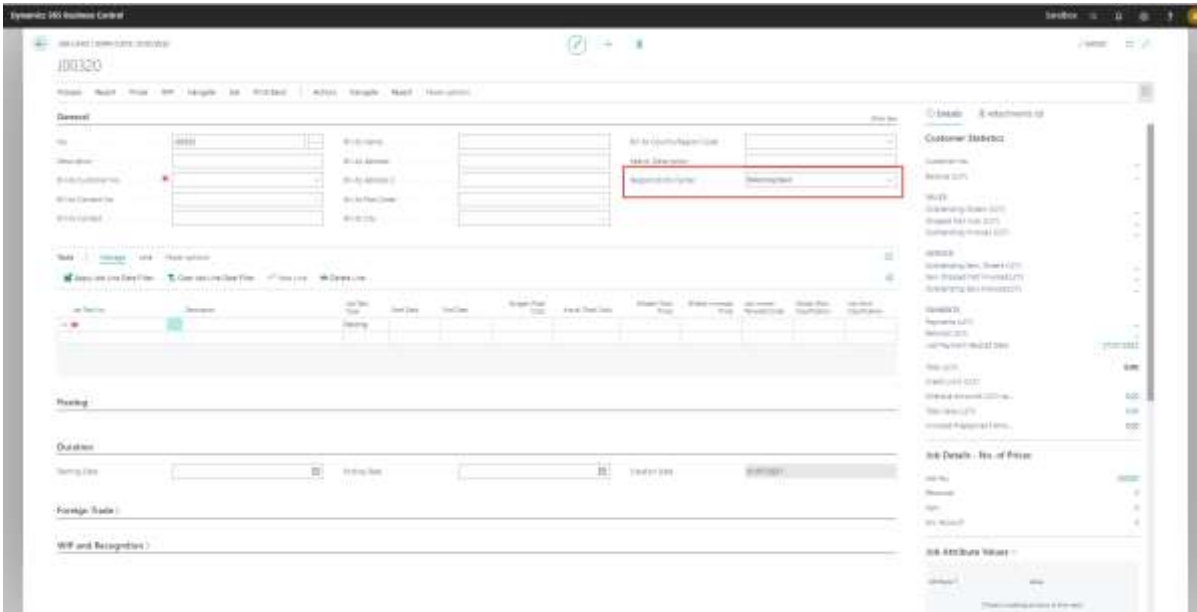


Creating a new Job

Create a new 'Job' by selecting 'New' on the Job List.



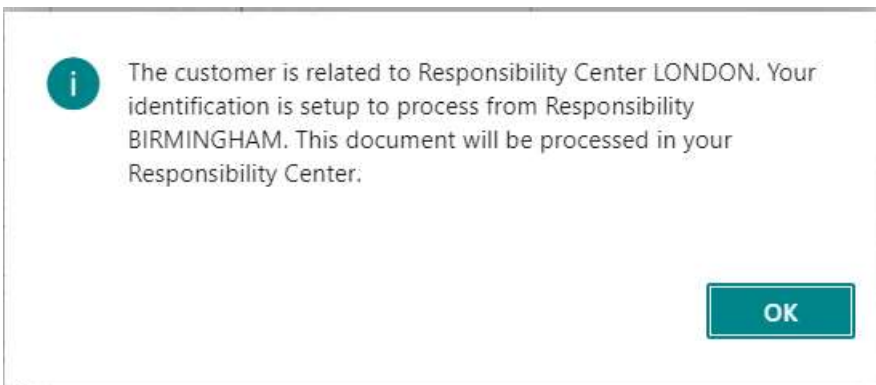
When a new Job is created the Job Card will open. The Responsibility Center in the User Setup will automatically be applied in the Job



Field	Description
Responsibility Center	Used to specify Responsibility Center on a Job. This field will be automatically filled based on your User Setup.

Creating a Job for a customer with a different Responsibility Center than the User Setup

In standard Business Central the Responsibility Center field is also available on the customer card. It might occur that a Customer No. is entered in the Job with a deviating Responsibility Center than the User Setup. In this case the following message will occur when entering a Customer in the Job Card.



This message notifies the user that the Responsibility Center for the customer is different from the User Setup. The Responsibility Center Setup will in this case be applied and will overrule the Setup in the Customer Card.

8. FINANCIAL ALLOCATIONS

8.1 Description and objective

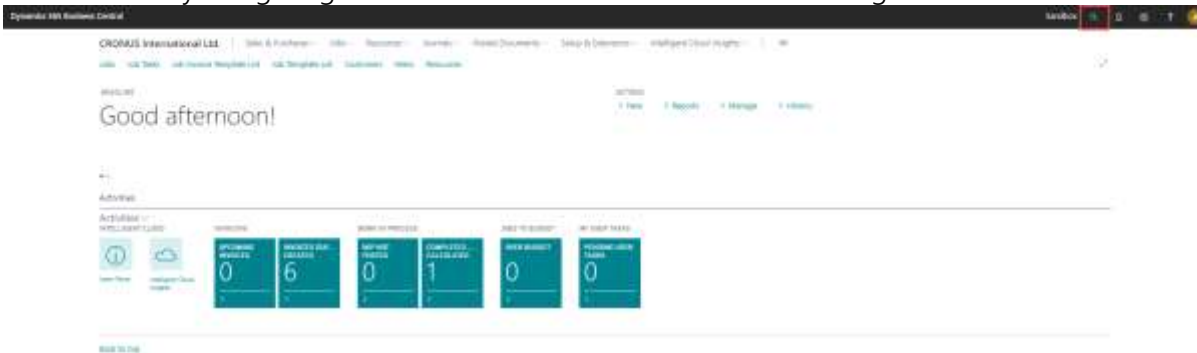
This functionality is for companies who work on a project basis and want to allocate work, costs and revenue within a project to be able to create reports and financial insights for project performance monitoring. It is possible to allocate these elements in a project using codes which are determined organization wide to maintain consistency for global financial project reporting. Additionally, it is possible to allocate work using Job specific codes to be able to create project specific financial reporting possibilities.

8.2 Setup Global Work Classification Codes

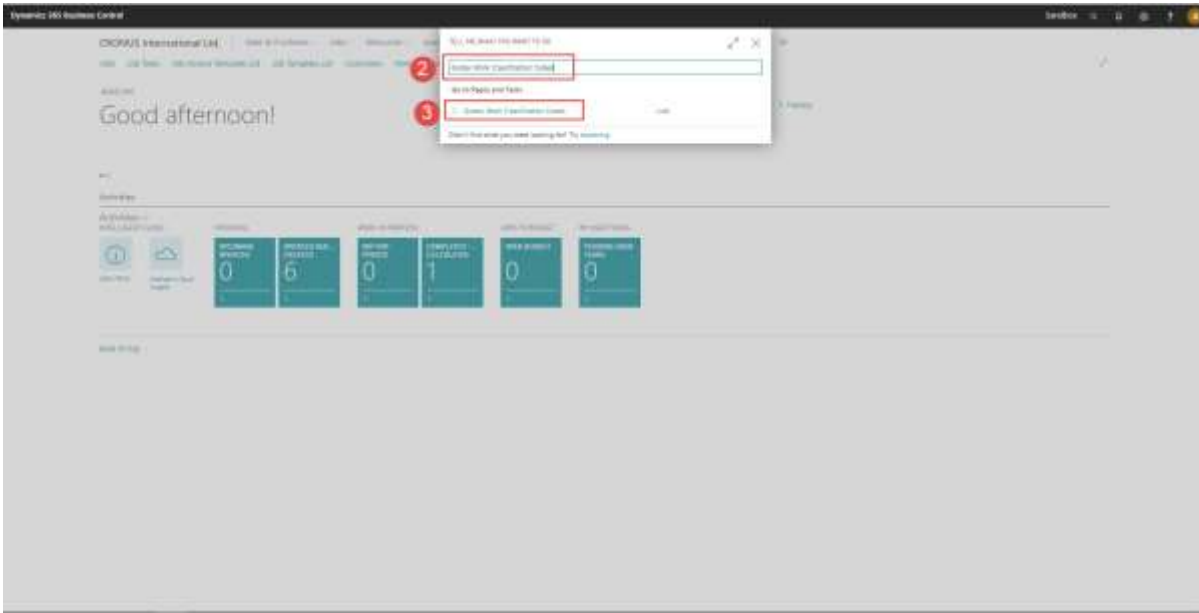
Global Work Classification Codes are codes that can be defined company wide, so every user working with Jobs can use the same codes to allocate work, costs and benefits in a Job. This makes it possible to create financial reports over all Jobs using the same data.

To be able to use Global Work Classification Codes they must be set up first.

1. Start by navigating to "Global Work Classification Codes" using the search function

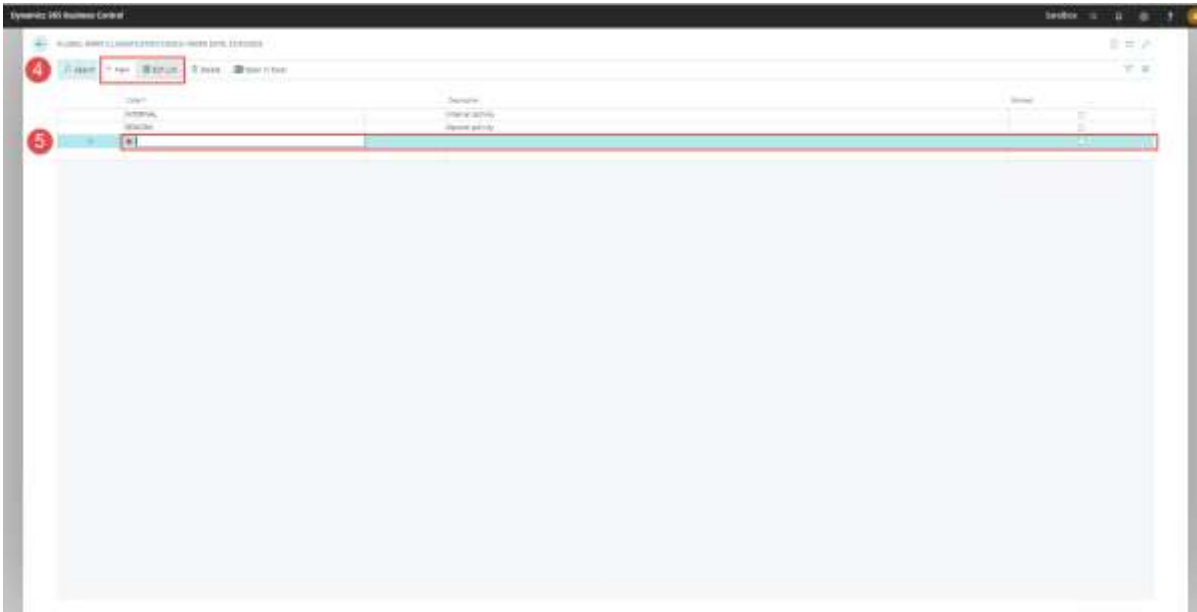


2. Enter 'Global Work Classification Codes' in the search bar
3. Click on the suggestion 'Global Work Classification Codes' list page.



4. Select 'New' or 'Edit List' to add or edit Global Work Classification Codes in de the list.
5. Enter the Global Work Classification record using the fields as following:

Field	Description
Code	Specifies the Code for the Work Classification Code. The application of the Work Classification Code should be recognizable from the code.
Description	Specifies the Description of the Work Classification Code. The application of the Work Classification Code should be recognizable from the description.
Blocked	Specifies if the Work Classification Code is blocked. When blocked the Work Classification Code cannot be applied in a Job. The Work Classification code can however still be used in Jobs the code is already applied in.



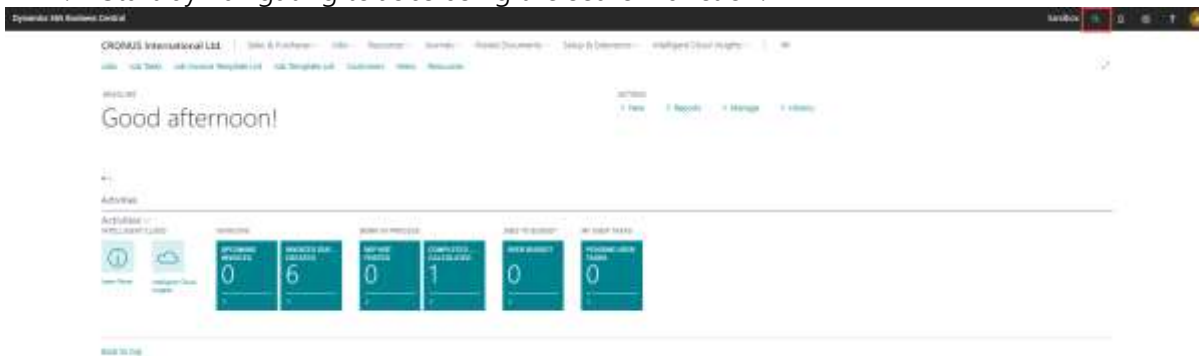
Note: When a Global Work Classification Code is already in use in a Job, the record cannot be edited. The following message will appear after trying this: "This Global Work Classification Code cannot be edited, because it's currently in use in a Job"

8.3 Setup Job Work Classification Codes

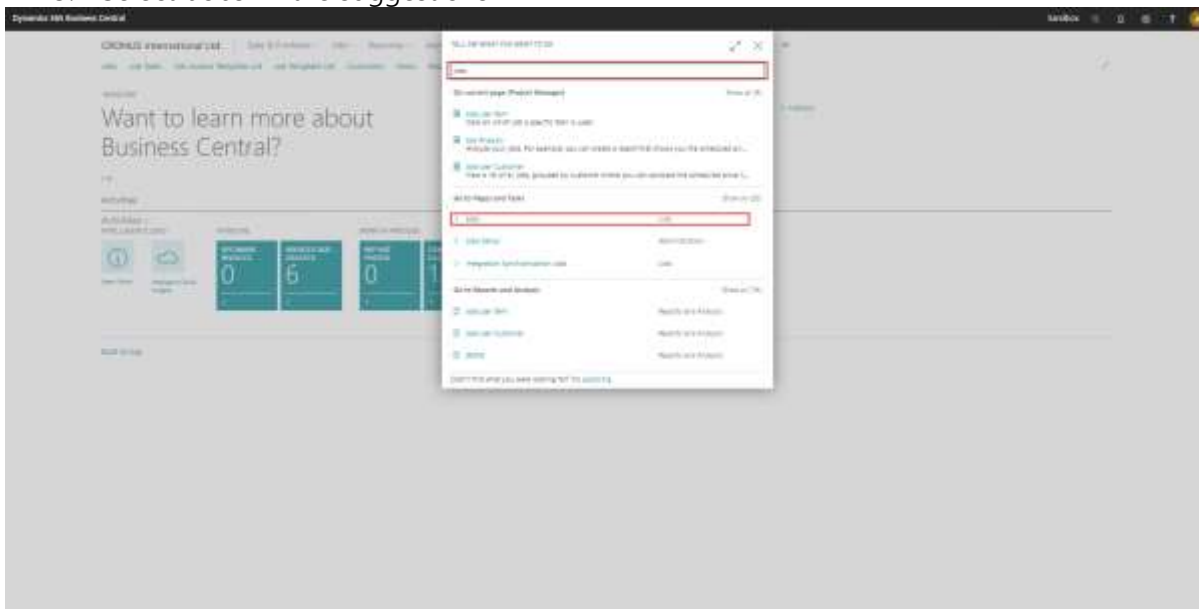
Job Classification Codes are codes that can be defined for a specific Job to allocate work, costs or revenue. These codes can only be applied to the Job they are created for. This makes it possible to create financial reports within Jobs.

To be able to use Job Work Classification Codes they must be set up first.

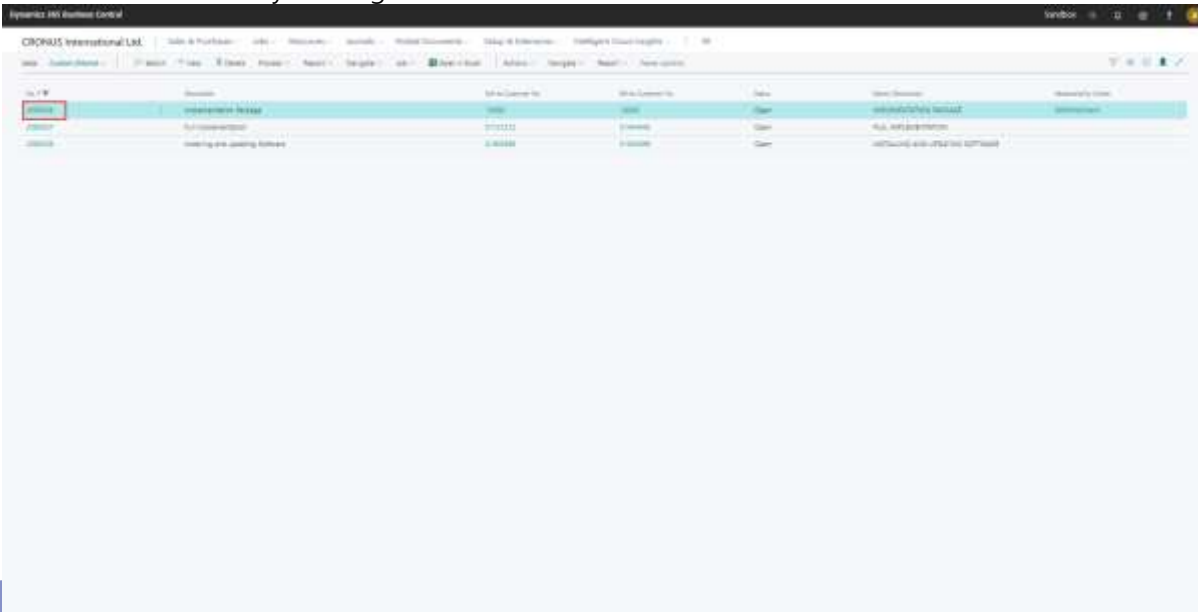
1. Start by navigating to Jobs using the search function.



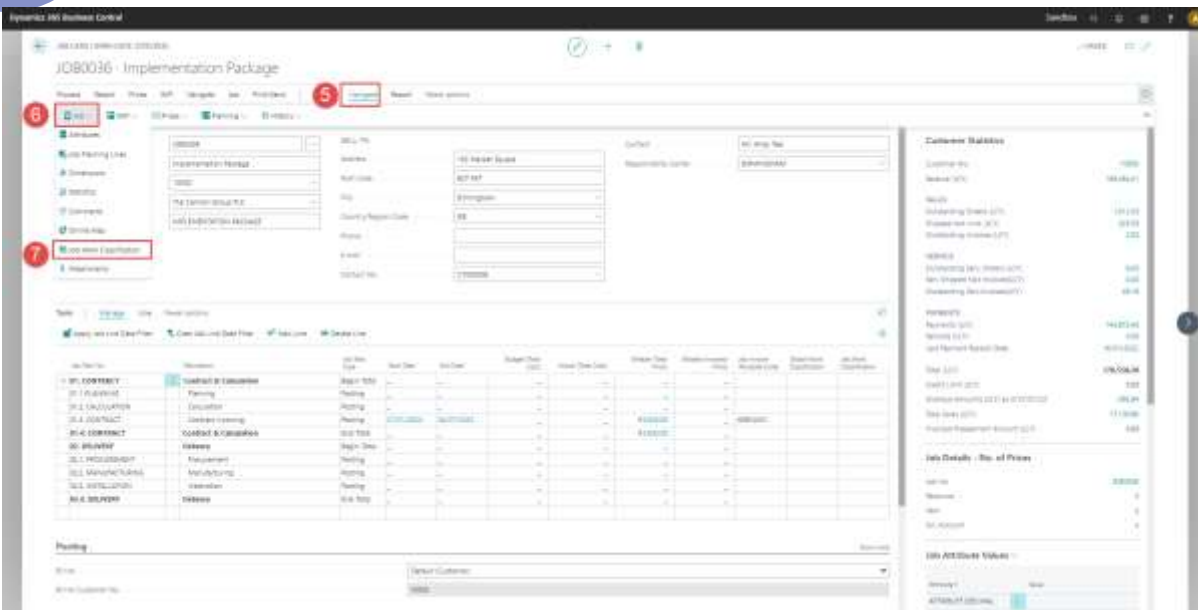
2. Enter 'Jobs' using the search function
3. Select 'Jobs' in the suggestions



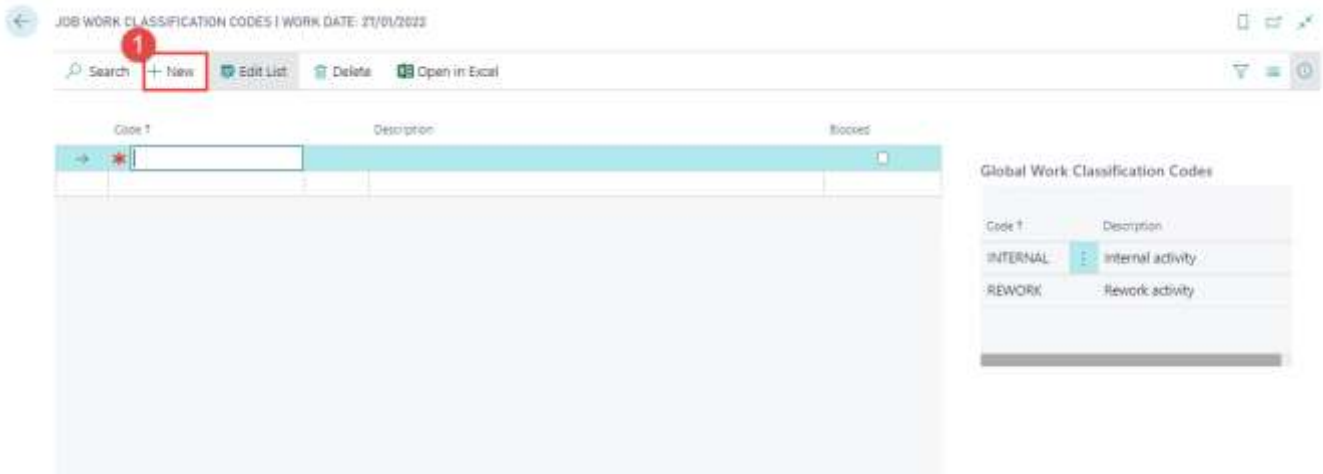
4. Select a Job by clicking on the Job No. or Create a New Job



5. In the Job Card page, select 'Navigate' in the ribbon
6. Select the drop down-option of 'Job'
7. Select Job Work Classification to navigate to the Job Work Classification page



From the Job Work Classification Codes page select new to create a new Job Work classification code.



Enter the data in the fields as following:

Field	Description
Code	Specifies the Code for the Work Classification Code. The application of the Work Classification Code should be recognizable from the code.
Description	Specifies the Description of the Work Classification Code. The application of the Work Classification Code should be recognizable from the description.
Blocked	Specifies if the Work Classification Code is blocked. When blocked the Work Classification Code cannot be applied in a Job. The Work Classification code can however still be used in Jobs the code is already applied in.

Note: When a Job Work Classification Code is already in use in, the record cannot be edited. The following message will appear after trying this: "This Job Work Classification Code cannot be edited, because it's currently in use in a Job"

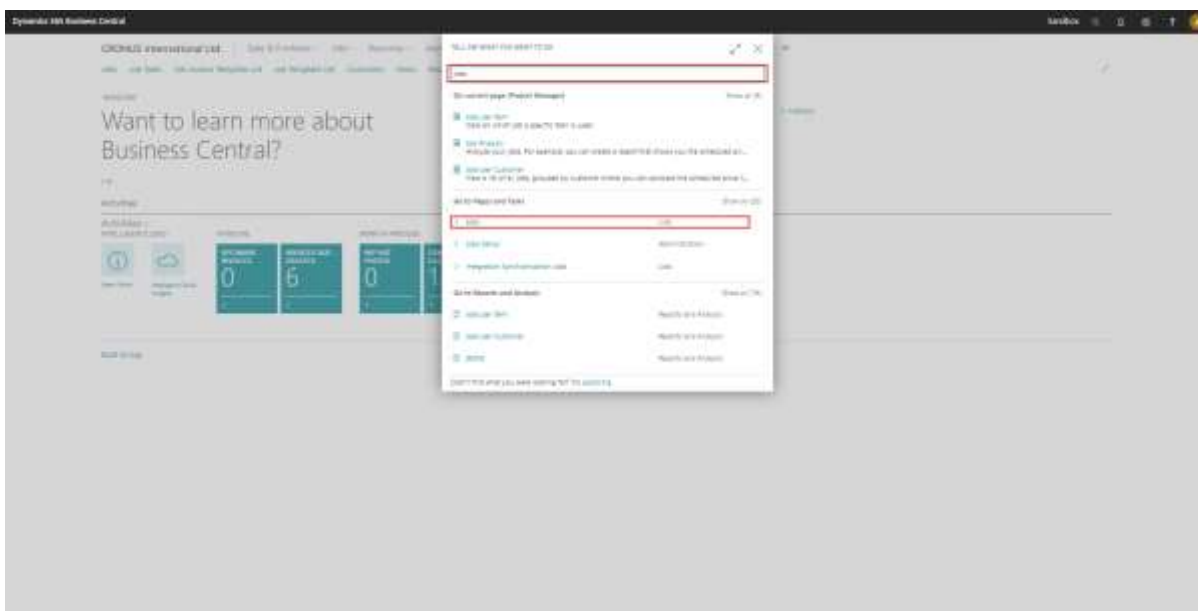
8.4 Apply Work Classification Codes in Job Sales Documents

Work Classification codes can be used in Sales Documents created from Jobs to allocate revenue posted to a Job. Work Classification Codes are applied in Job Planning Lines. When creating Sales Documents from Job Planning Lines the Work Classification Codes are taken over to the Sales Document.

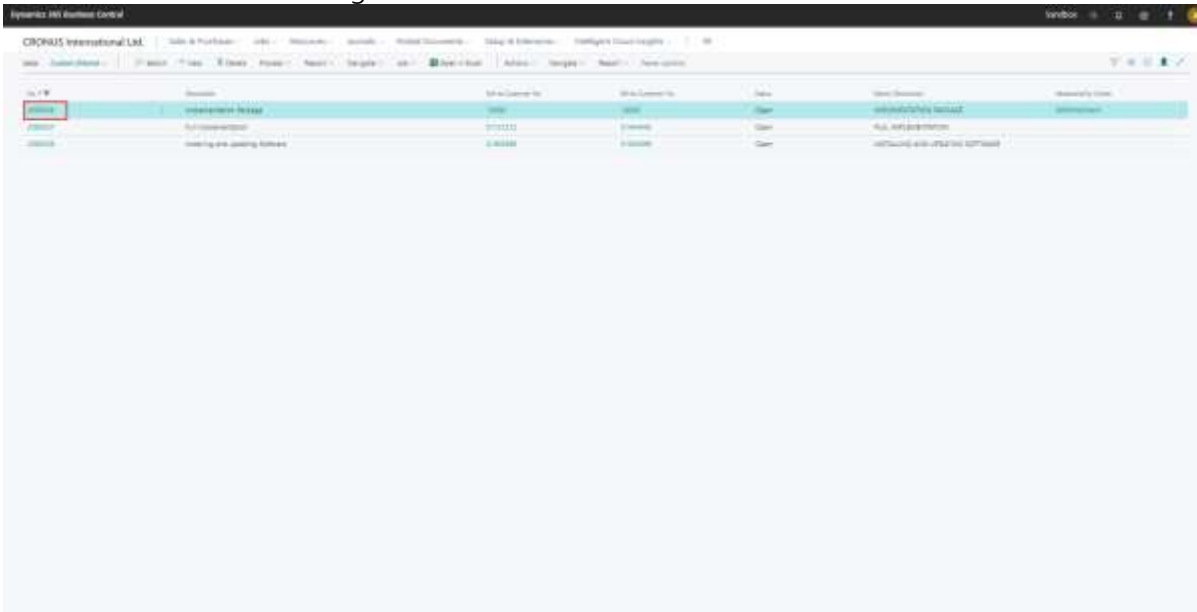
Note: the example which is used for the scenario-navigation is for taking Work Classification Codes to Sales Invoices and Posted Sales Invoices. To produce a scenario to take Work Classification codes to Sales Credit Memo's, you have to take a negative quantity in the Job Planning Line, use the page action Create Sales Credit Memo in step 9 and navigate to Sales Credit Memos in step 11.

Field	Description
Global Work Classification Code	Used to specify the Global Work Classification Code
Job Work Classification Code	Used to specify the Job Work Classification Code

1. Start by selecting the search function
2. Enter 'Jobs' in the search function
3. Select 'Jobs' in the suggestions to open the Jobs list page

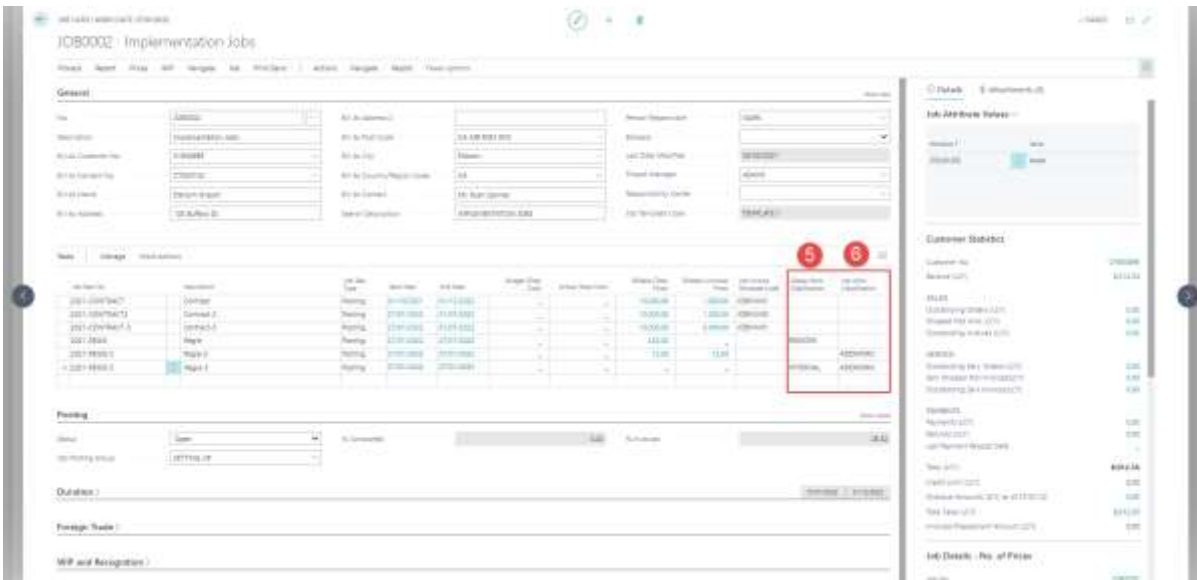


4. Select a Job selecting a Job No.

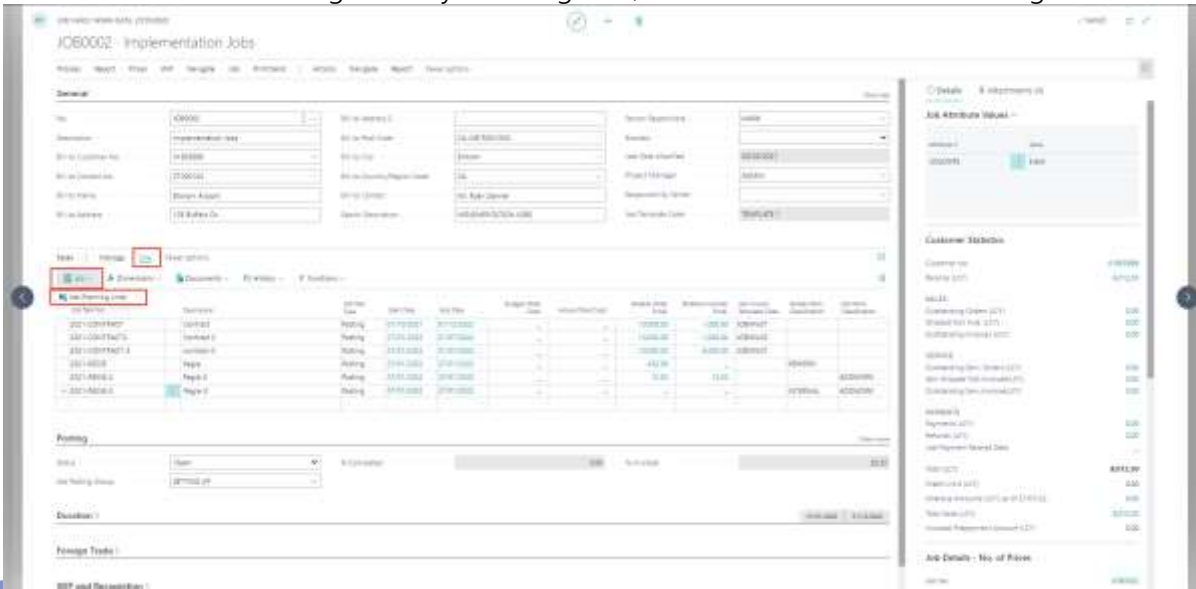


- 5. Specify Global Work Classification Code on Job Task
- 6. Specify Job Work Classification Code on Job Task

Note: Entering Work Classification Codes in a Job Task is fully optional. Entering Work Classification Codes on a Job Task makes sure the entered codes are automatically taken over to the Job Planning Lines created for the Job Task. Work Classification Codes can also be entered for Job Planning Lines manually if you choose to skip this step.

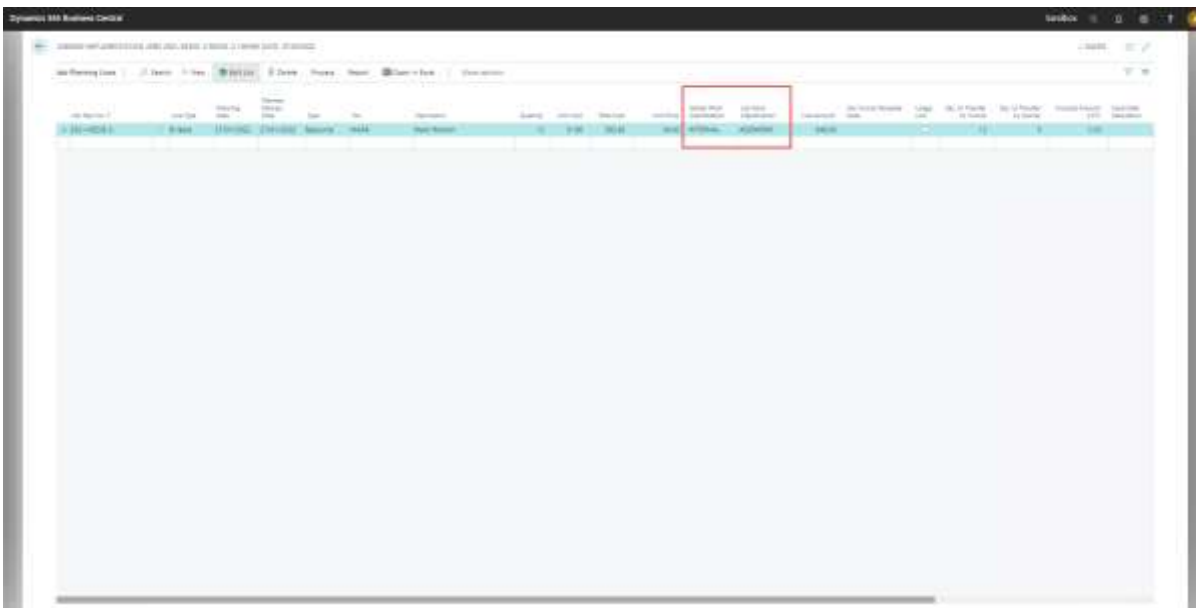


7. Go To Job Planning Lines by selecting Line, then Job and then Job Planning Lines

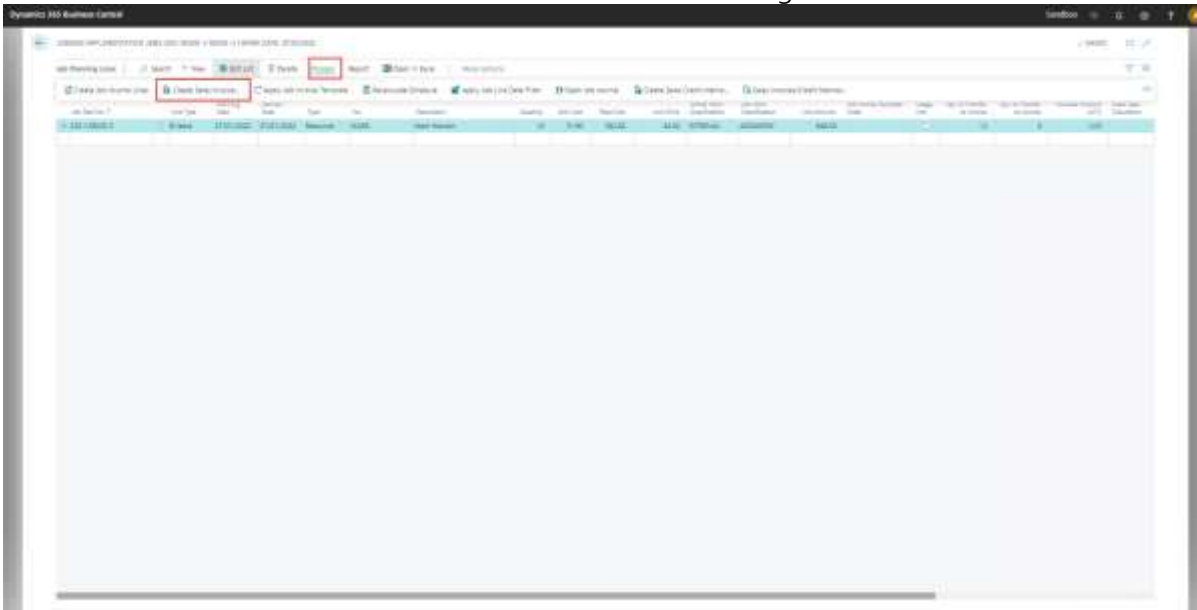


8. The Work Classification Codes will be taken over in the following fields if they were entered on the Job Task. The Work Classification Codes can also be entered manually in the following fields:

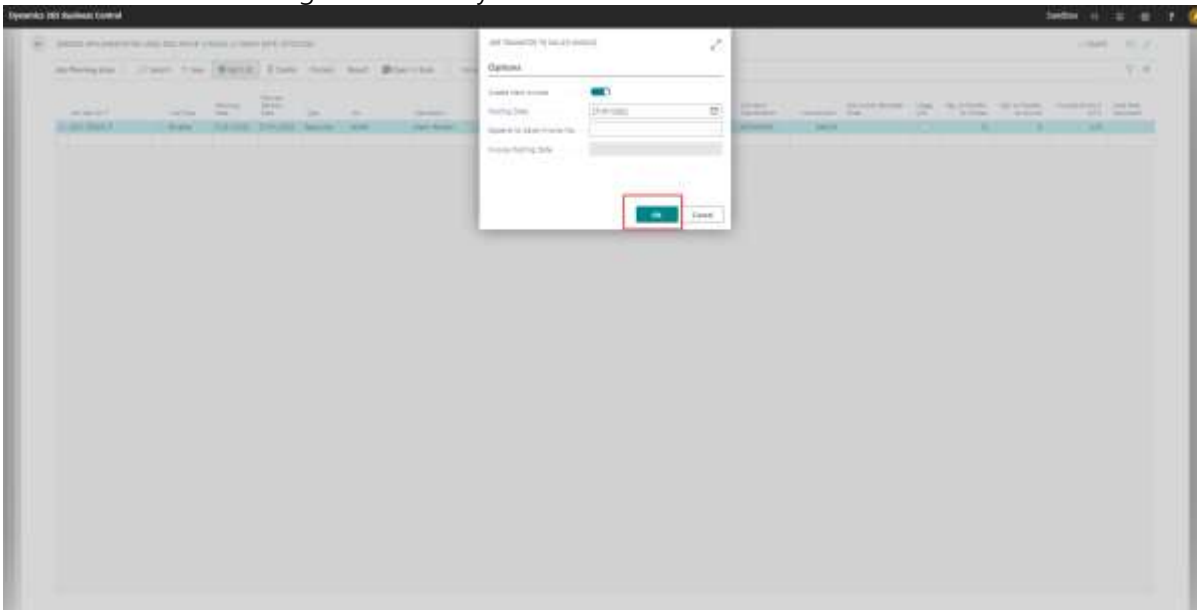
Field	Description
Global Work Classification Code	Used to specify the Global Work Classification Code for this Job Planning Line.
Job Work Classification Code	Used to specify the Job Work Classification Code for this Job Planning Line.



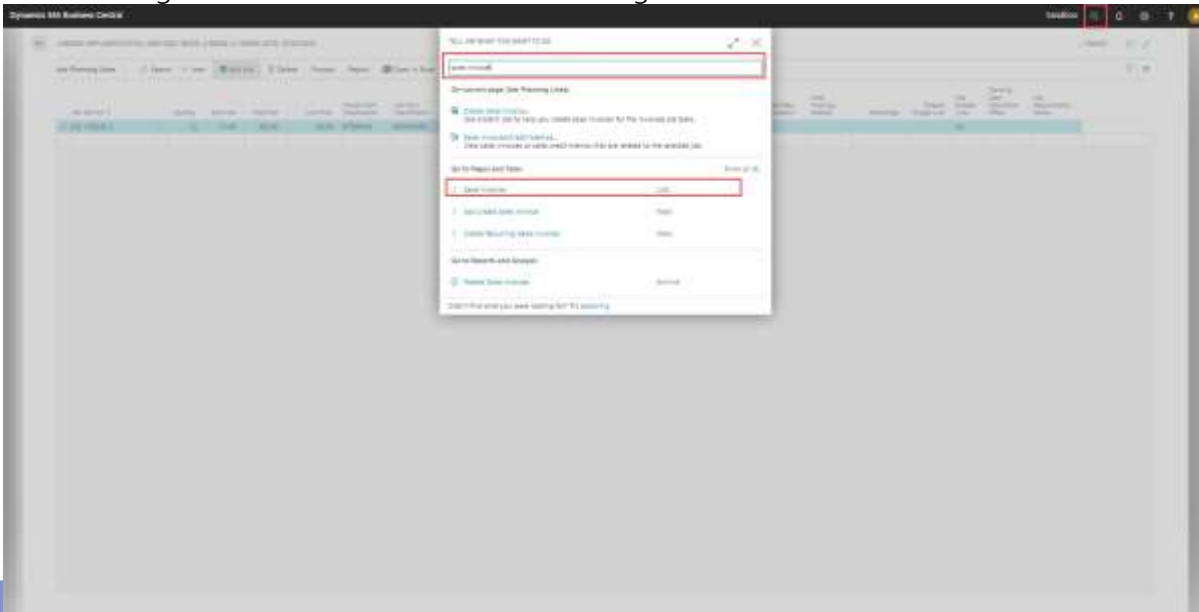
9. Select 'Create Sales Invoice' to Invoice the Job Planning Line



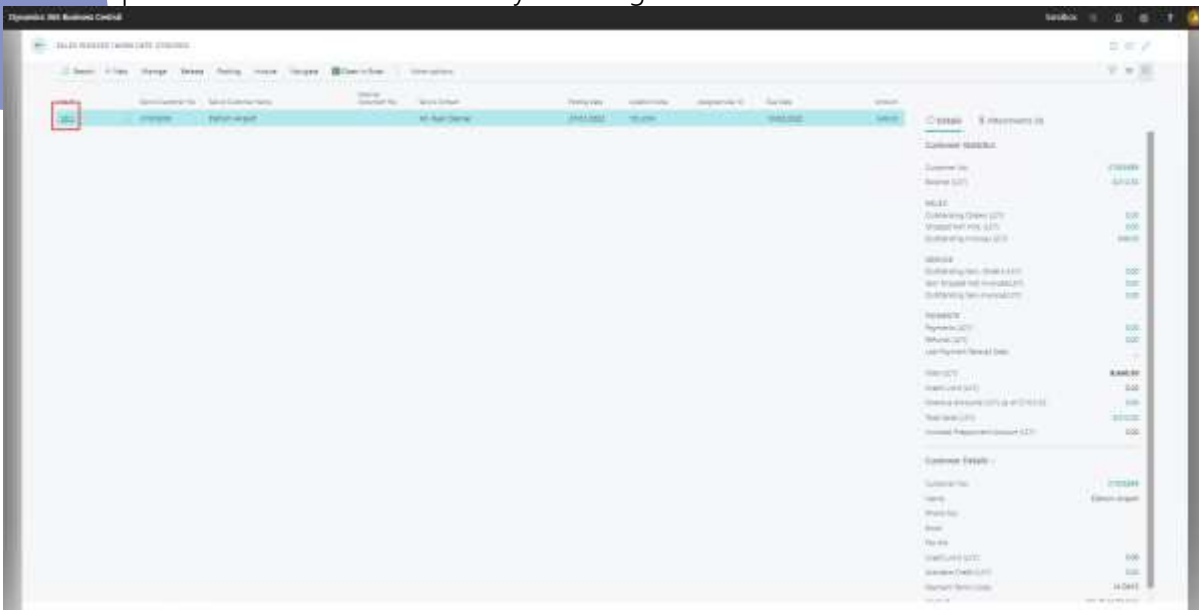
10. Select the settings with which you want to create the invoice and then select OK.



11. Navigate tot the created Sales Invoice using the search function.

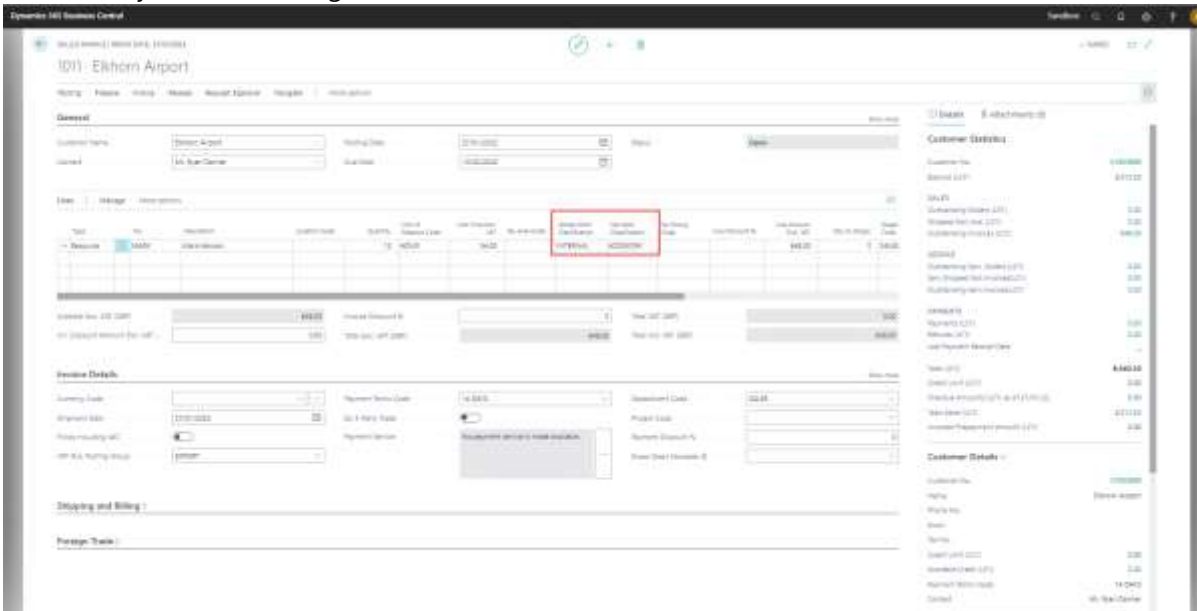


12. Open the created Sales Invoice by selecting the Sales Invoice No.

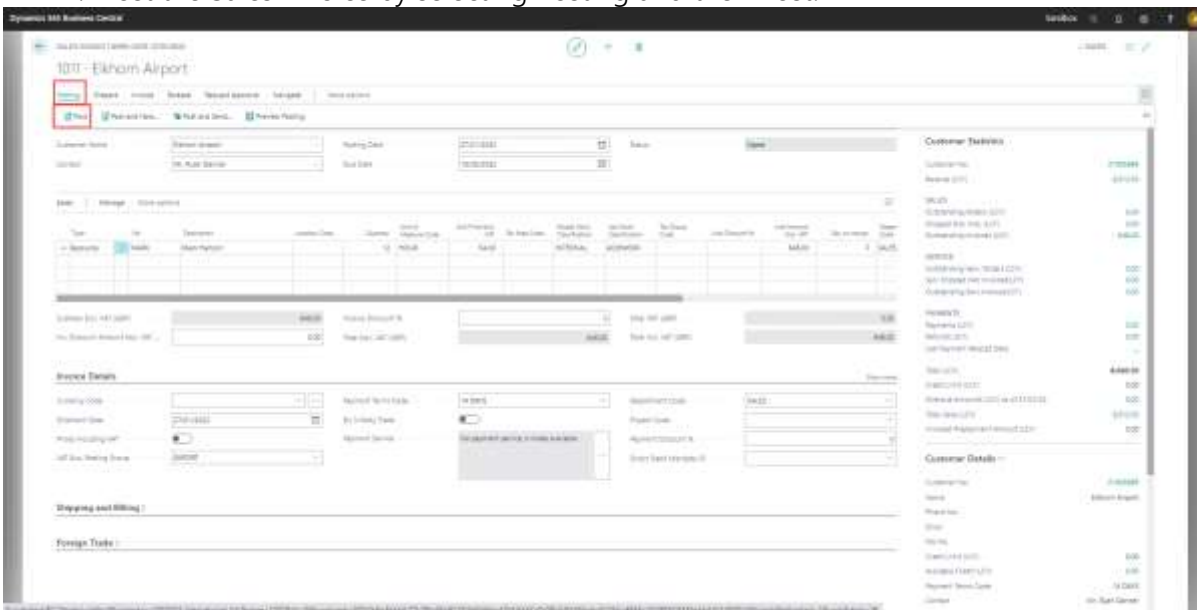


13. The Work Classification Codes are available on the Sales Invoice Line. The values are taken over from the Job Planning Line from which the Sales Invoices was created.

Note: Work Classification Codes are automatically taken over from the Job Planning Line. It is however possible to manually enter or change Work Classification Codes in a Sales Invoice.



14. Post the Sales Invoice by selecting Posting and then Post.



When posting the Sales Invoice the revenue generated from this posting will be also posted as Job Ledger Entries in the Job. The according Work Classification Codes will be automatically entered for this Job Ledger Entry in the posting.

8.5 Apply Work Classification Codes in Job Purchase documents

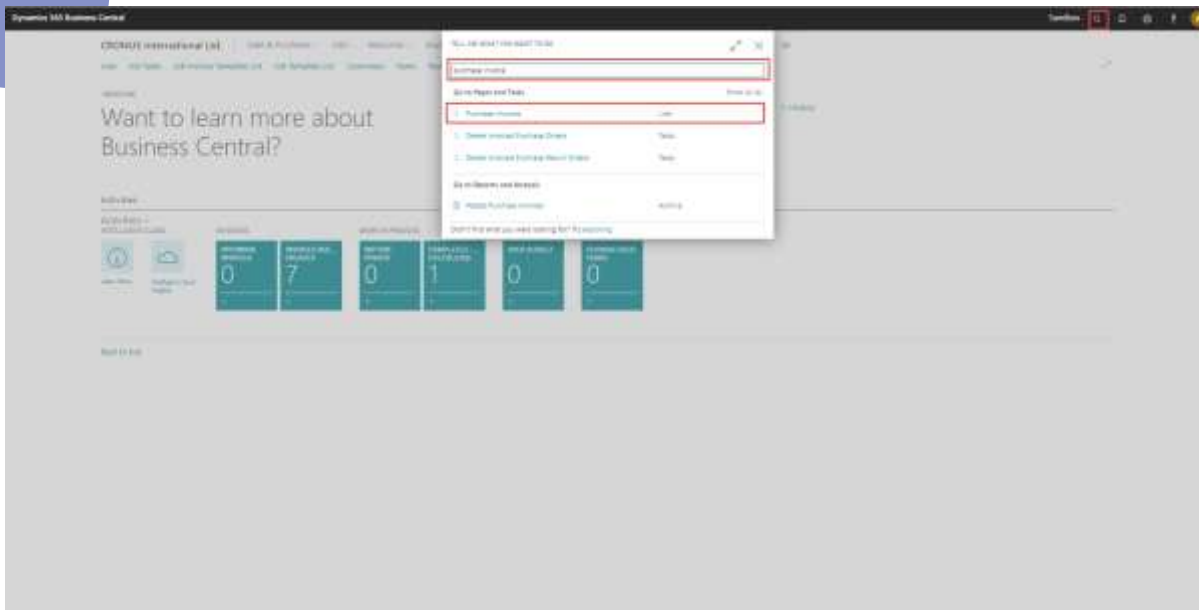
Work Classification codes can be used in Purchase Documents to allocate costs posted to a Job.

To add the right Work Classification Codes to the Purchase documents, the purchase documents must be linked to the Jobs. This can be done by filling the fields Job No. and Job Task No.

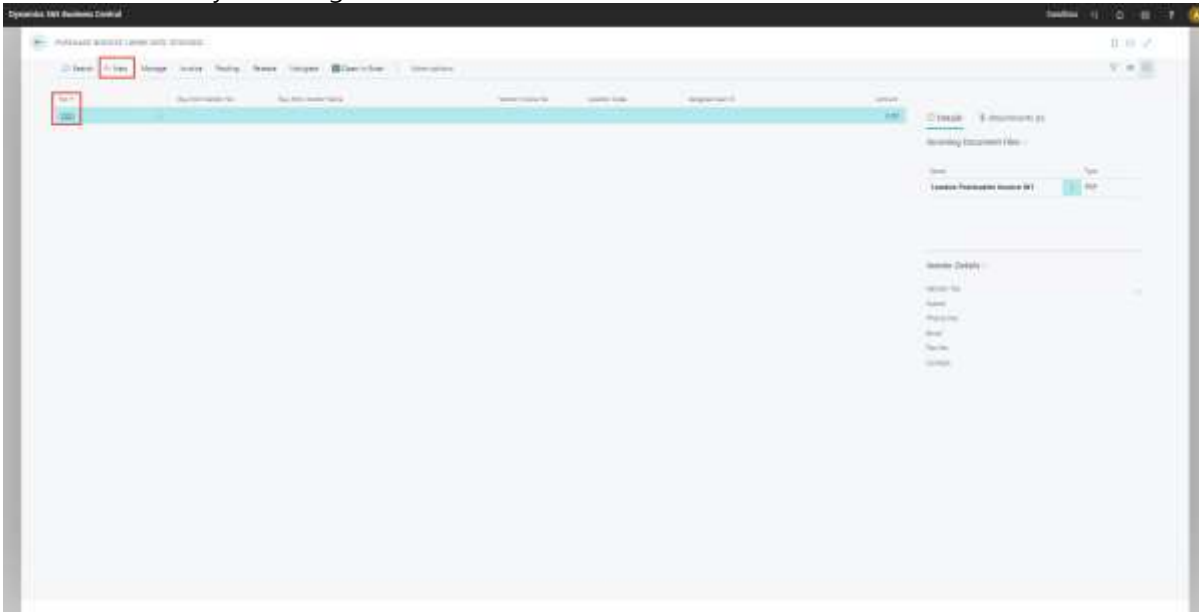
After filling a specific Job No. and Job Task No. the Work Classification Codes of the chosen Job Task are automatically taken to the Line of the Purchase document. This works for a Purchase Order, a Purchase Invoice and a Purchase Credit Memo.

Note: the Work Classification Codes can be changed after adding the Job No. and Job Task No. to the Purchase Order, Invoice or Credit Memo. For the Job Work Classification Code, only Job Work Classification Codes can be picked that are dedicated to the Job, filled in the Purchase Line. Furthermore, when Purchase lines are taken into manually created Purchase Invoices or Purchase Credit Memo's from a Purchase Order, the Work Classification Codes are taken from the Purchase line in the Purchase Order as well.

1. Start by navigating to Purchase Invoices using the search function
2. Enter 'Purchase Invoice' in the search bar
3. Select 'Purchase Invoices' from the search suggestions.



4. Select an existing Purchase Invoice by selecting the Purchase Invoice No., or create a new Purchase Invoice by selecting New.



5. In the Purchase Invoice enter the Job No. and Job Task No. fields to link the Job to the Purchase invoice.
6. The Work Classification Codes will be automatically taken over in the Purchase Invoice Line if they have been entered in the Job. They can also be changed or entered manually.

Note: the Job Work Classification Code can only be changed to a Job Work Classification Code linked to the Job no. which is filled in the Purchase Line

Field	Description
Global Work Classification Code	Used to specify the Global Work Classification Code for this Purchase Line.
Job Work Classification Code	Used to specify the Job Work Classification Code for this Purchase Line.

Progressive Home Furnishings

Order: 1001

Order Date: 11/11/2021

Order Status: Open

Item	Qty	Description	Unit Price	Order Qty	Order Total	Unit Cost	Order Total Cost	Order Total Tax	Order Total Net	Order Total Gross
1	1	Progressive Home Furnishings	1000.00	1	1000.00	500.00	500.00	0.00	500.00	1000.00

Order Summary

Order Total: 1000.00

Order Total Tax: 0.00

Order Total Net: 500.00

Order Total Gross: 1000.00

Customer Details

Customer Name: Progressive Home Furnishings

Customer Address: 1234 Main St, Anytown, CA 90210

Customer Phone: (555) 123-4567

Customer Email: info@progressive.com

Shipping and Payment

Shipping Method: Standard

Payment Method: Credit Card

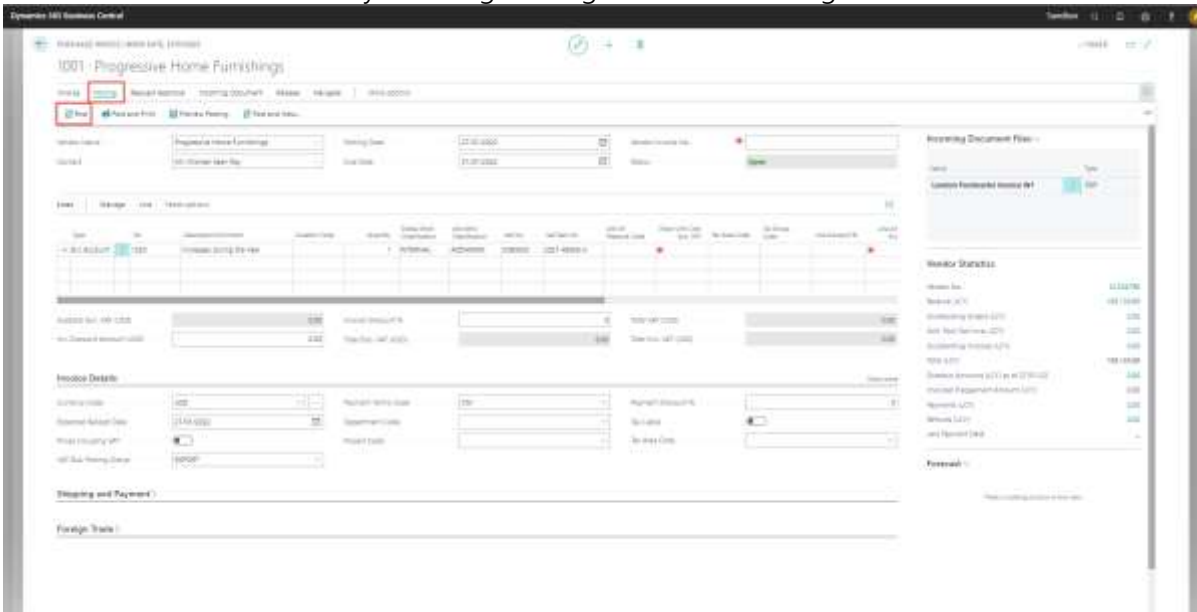
Forecast

Forecasting Period: 12/1/2021 - 12/31/2021

Forecast: 1000.00



7. Post the document by selecting Posting and then selecting Post.

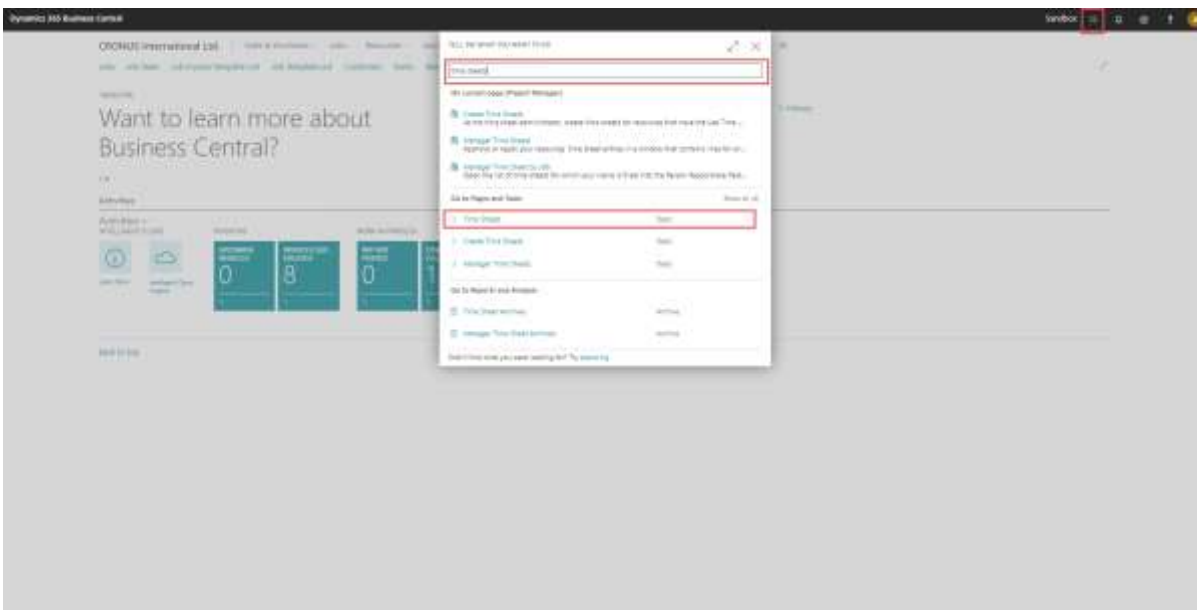


After Posting the Purchase document the costs will also be posted as Job Ledger Entries in the Job. The according Work Classification Codes will also be taken over to the Job.

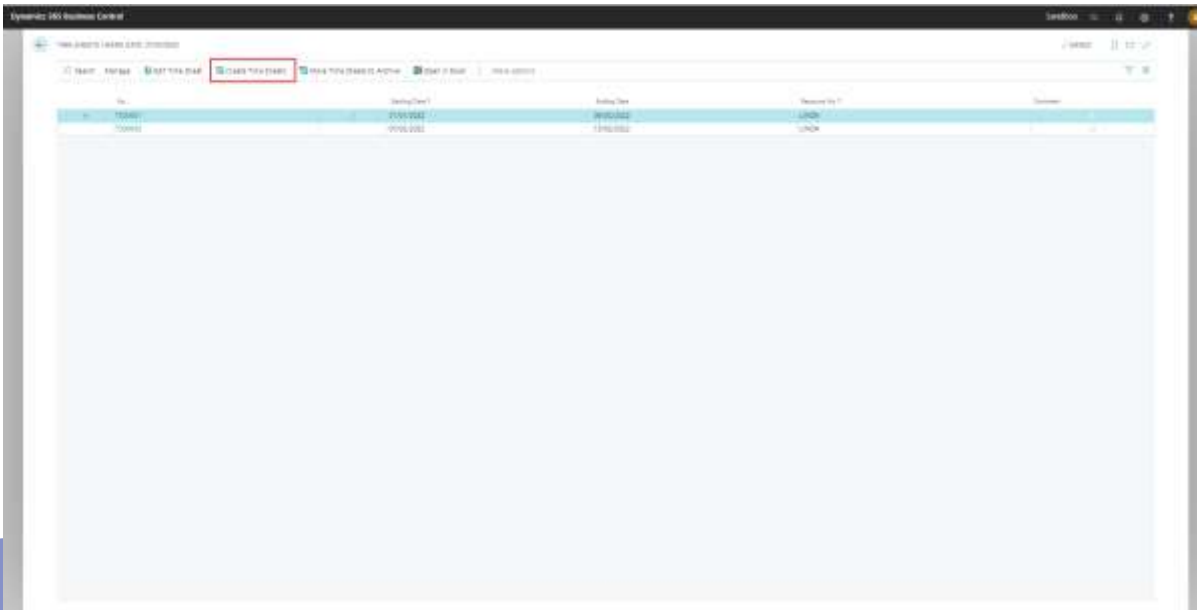
8.6 Apply Work Classification Codes in Time Sheets

Work Classification Codes can be applied in Time Sheets to allocate costs to a job when time is posted.

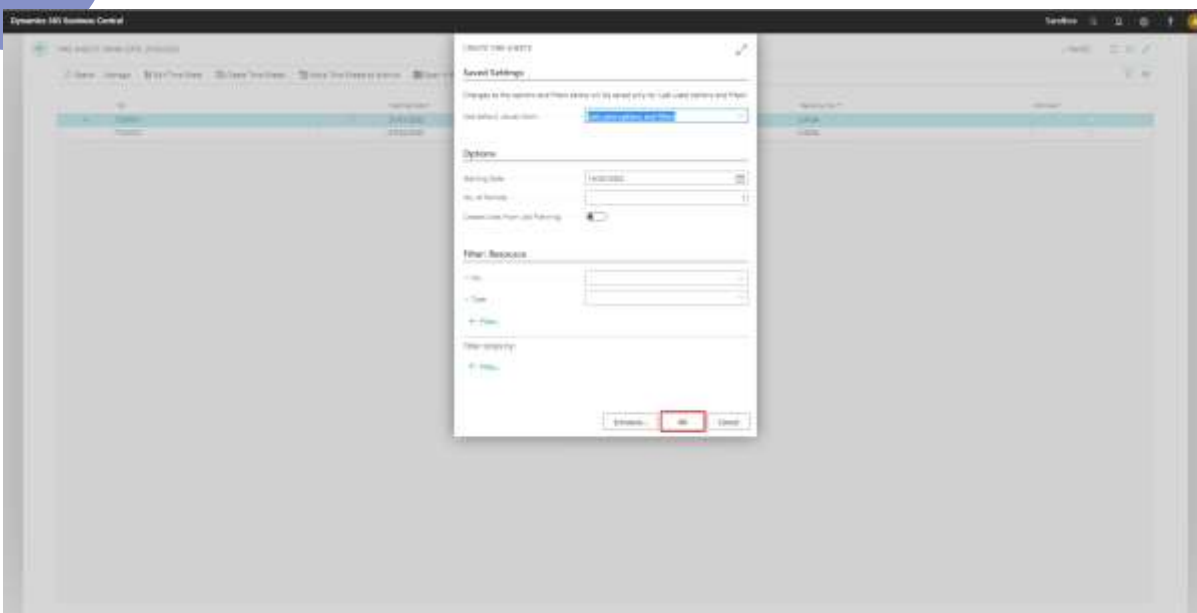
1. Use the search function to navigate to time sheets
2. Enter 'Timer Sheets' in the search bar.
3. Select 'Time Sheets' in the suggestions to navigate to the Time Sheets.



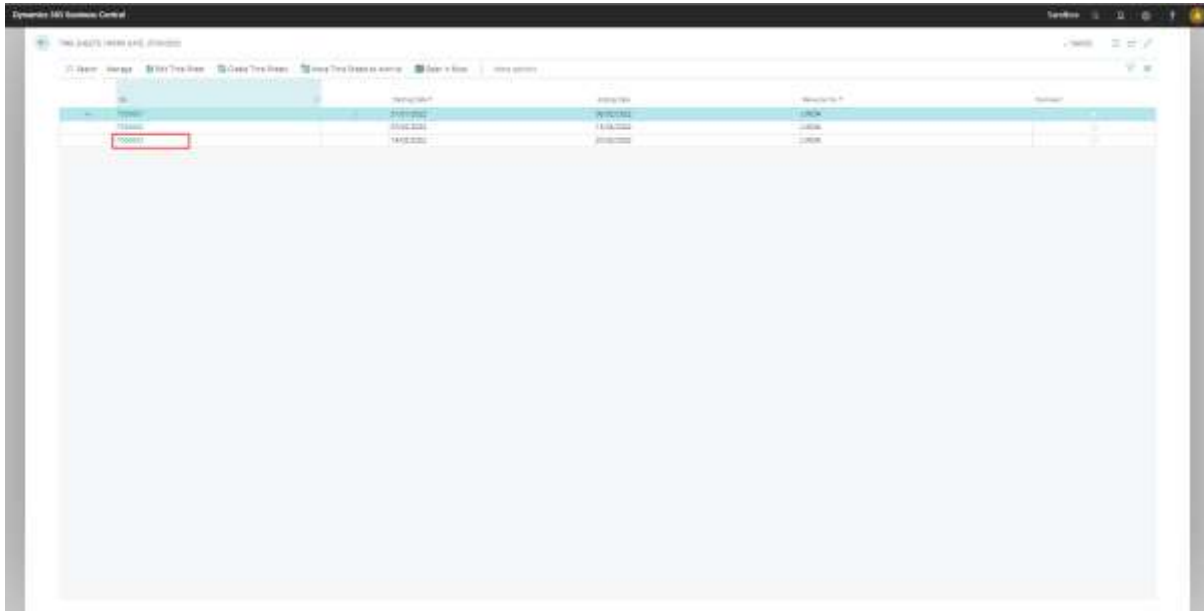
4. Select Create Time Sheet to create a new Time Sheet for resources.



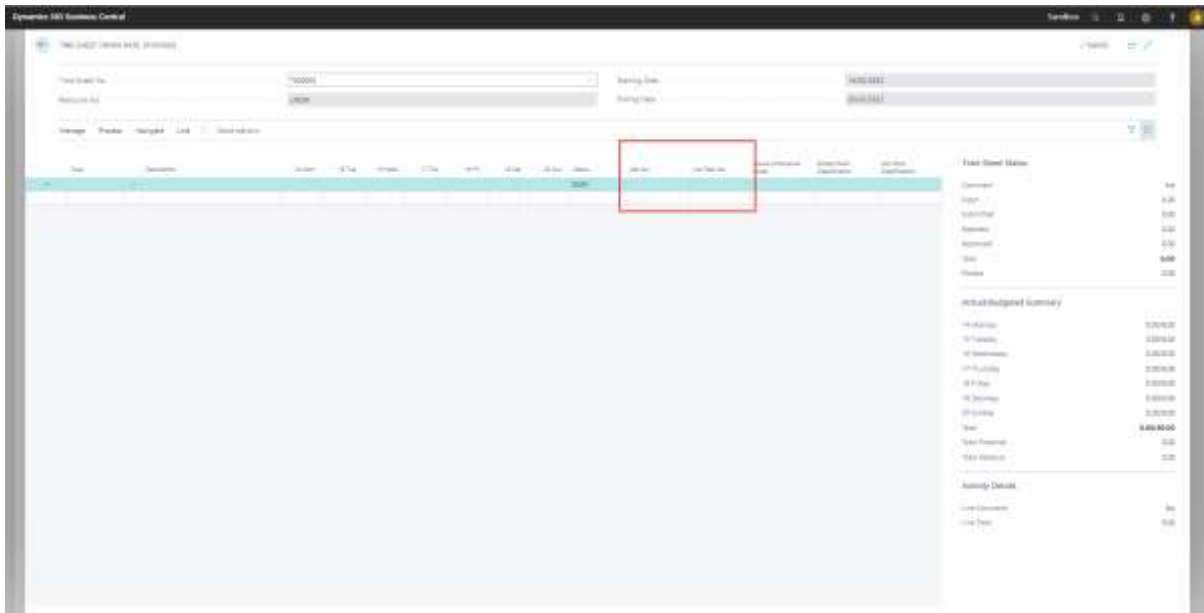
5. Configure the options to create the Time Sheet and confirm with OK.



6. Select the new Time Sheet and open it by clicking on the No. field

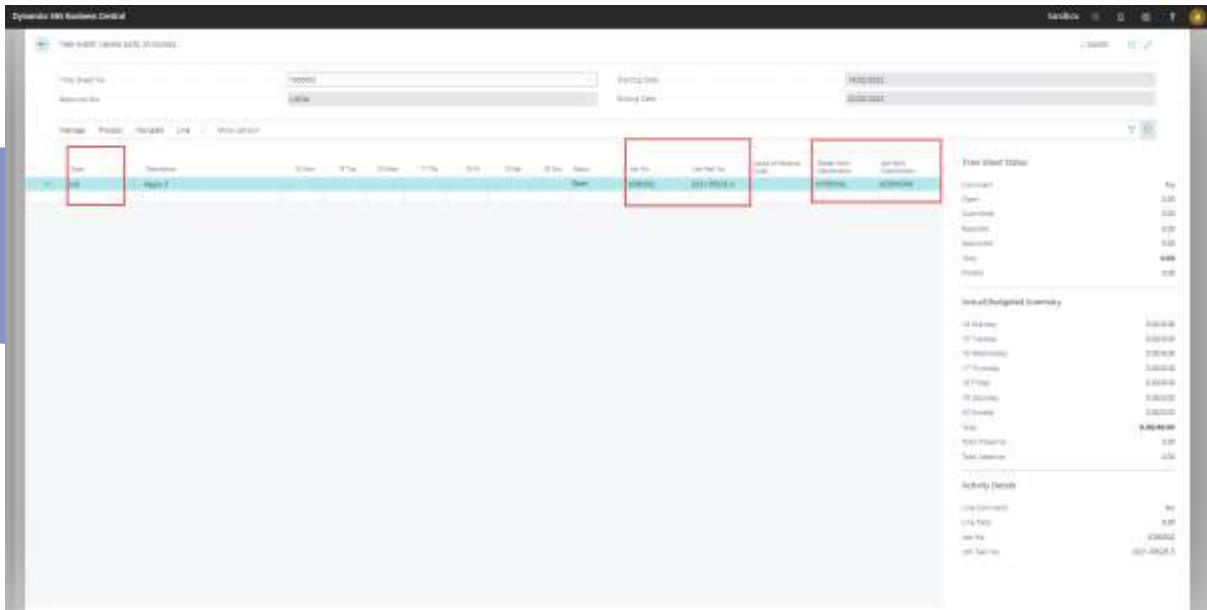


7. Enter "Job" in the Type field.
8. Enter the Job No. and Job Task you want to relate your Time Sheet to.



9. The Work Classification Codes are taken automatically from the Job Task. Note that the Work Classification Codes can be changed or entered manually as well.

Field	Description
Global Work Classification Code	Used to specify the Global Work Classification Code for the Time Sheet Line.
Job Work Classification Code	Used to specify the Job Work Classification Code for the Time Sheet Line.



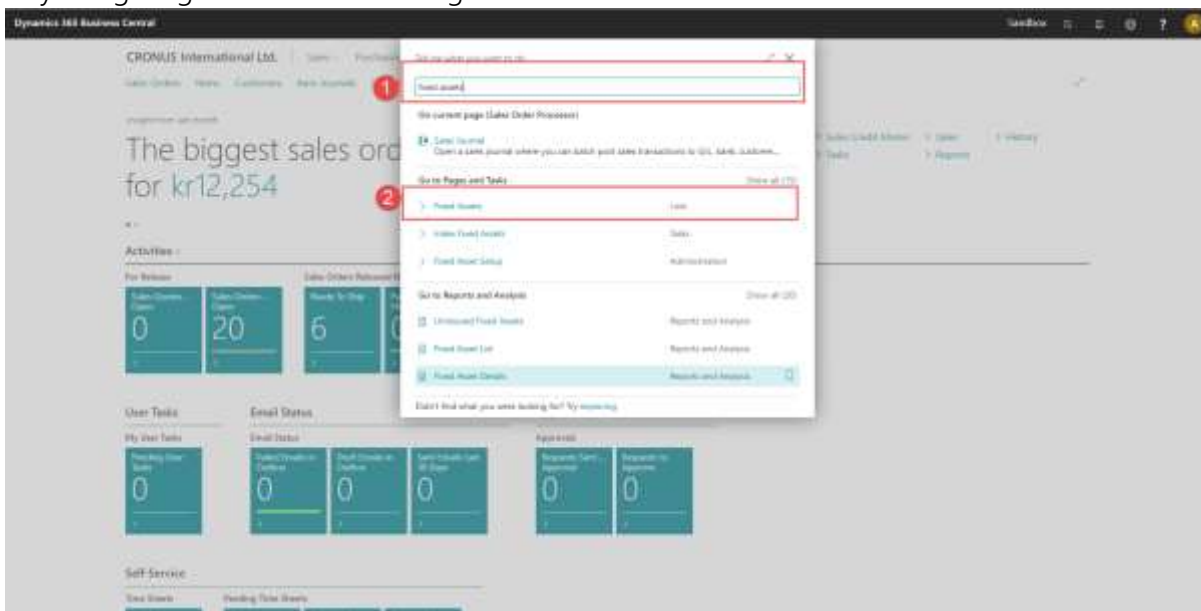
9. FIXED ASSETS

9.1 Description and objective

The Project management - Fixed Assets functionality makes it possible to link Fixed Assets to a Job, so that depreciations are also posted as Job Ledger Entries to the Job . This creates the possibility create a central point of view for costs and revenue for a fixed asset.

9.2 Setup Fixed Assets for Jobs

Start by navigating to Fixed Assets using the search function.



From the Fixed Assets list page either create a new fixed asset or open an existing fixed asset.

Dynamics 365 Business Central

Fixed Assets

1 + New

No. F	Description	Responsible Employee	Ac. Date Code	Ac. Subclass Code	Ac. Location Code	Ac. No.	Ac. Sub No.	Unit Type	Unit Quantity
FA000010	Mercedes 300	OP	TRABE01	CAR	454	TRABE01_1	110	Budget	1.00
FA000020	Toyota Supra 5.0	OP	TRABE01	CAR	5425				0.00
FA000030	VW Transporter	OP	TRABE01	CAR	PR00				0.00
FA000040	Compaq Mini Asset	MH	TRABE01	AMCH0001	BU01_2				0.00
FA000050	Compaq 641	MH	TRABE01	AMCH0001	BU01_2	TRABE01_1	110	Budget	1.00
FA000060	Compaq 475	MH	TRABE01	AMCH0001	BU01_2				0.00
FA000070	Compaq Compaq	MH	TRABE01	AMCH0001	BU01_2				0.00
FA000080	USB for Kumble	MH	TRABE01	AMCH0001	PR00				0.00
FA000090	Subscriptions	TH	TRABE01	TELEPHONE	RECEPTION				0.00

Notes +

Please click on the icon to the right.

In the Fixed Asset Card Page it is possible to link a Fixed Asset to a Job with the fields available in the Jobs Fasttab.

Dynamics 365 Business Central

Fixed Asset Card

FA000010 - Mercedes 300

2 + New

1 + New

General

Description: Mercedes 300, Ac. Date Code: TRABE01, Ac. Subclass Code: CAR, Responsible Employee: OP, Ac. No.: 454, Ac. Sub No.: TRABE01_1

Depreciation Book: [Empty]

Maintenance: [Empty]

Jobs

Job No.	Job Sub No.	Unit Type	Unit Quantity
TRABE01_500	110	Budget	1.00

Fixed Asset Picture: [Image Placeholder]

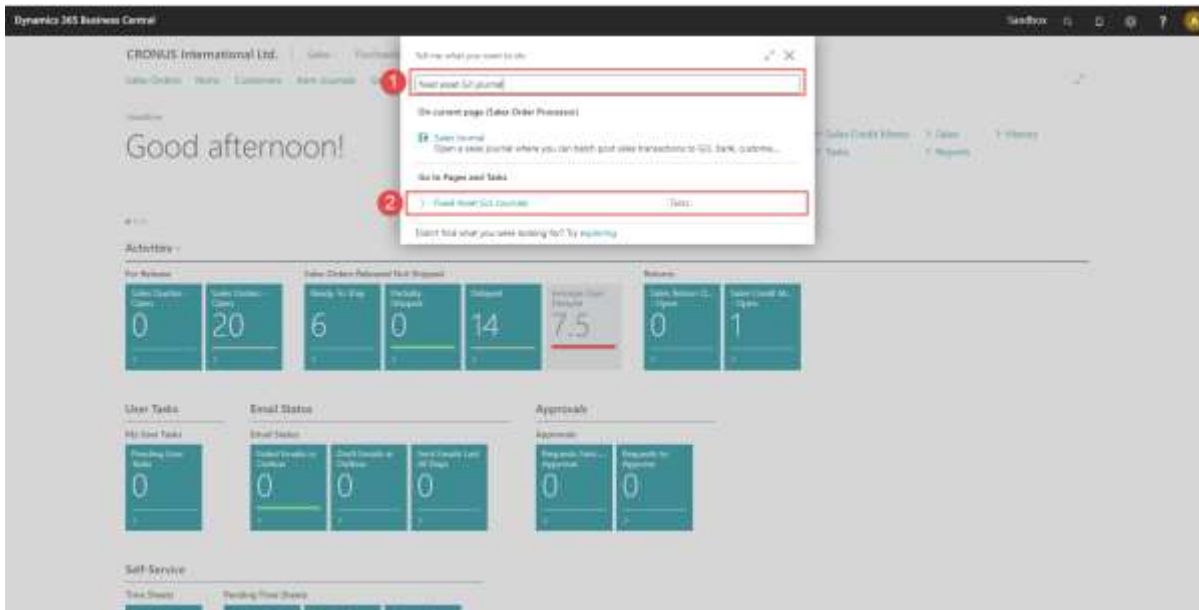
The following fields must be entered to make it possible to post fixed assets depreciations as Job Ledger Entries to a Job when using the Fixed Asset G/L Journal.

Field	Description
Job No.	Specifies the Job No. to which depreciations will be posted as Job Ledger Entries.
Job Task Line No.	Specifies the Job Task No. for which the Job Planning Line that will be created for the depreciation.
Line Type	Specifies the Line Type for the Job Planning Line that will be created for the depreciation. Usually this will be set as Budget since a depreciation will not be invoiced.
Job Quantity	Specifies the Job Quantity that will be used for the Job Planning Line created for the depreciation. Usually this will be set as 1 as the value of the depreciation must only be charged once to the Job.

9.3 Post Fixed Asset Depreciation to Job

By posting the Fixed Asset G/L Journal the depreciation will be posted as Job Ledger Entries when the Fixed Asset is linked to a Job.

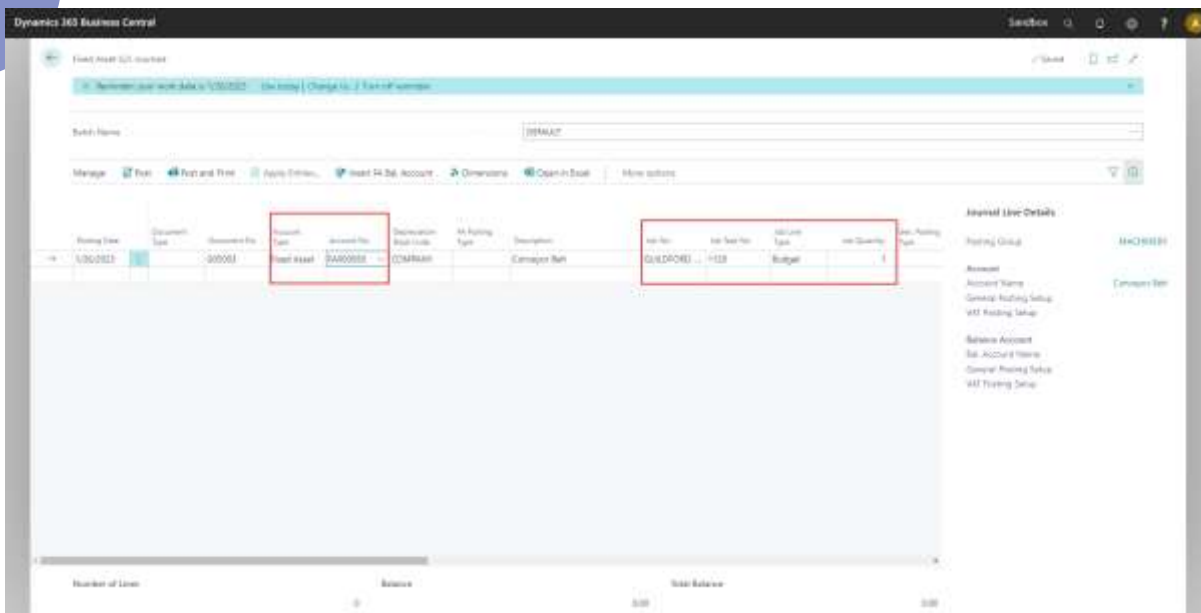
Start by navigating to the Fixed Asset G/L Journal using the search function.



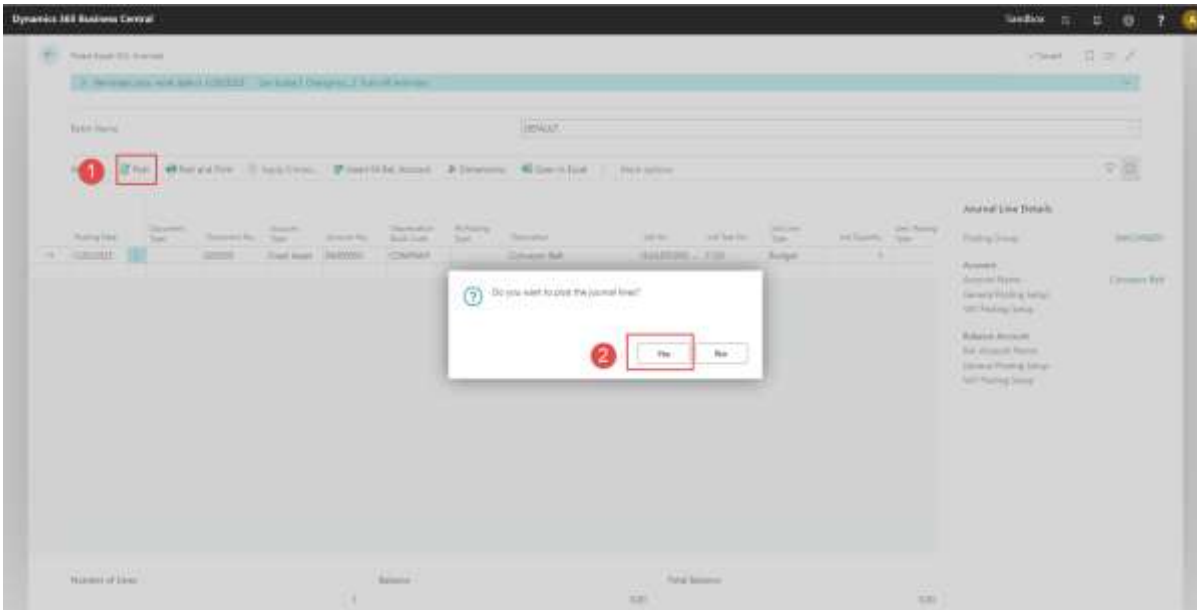
In the Fixed Asset G/L Journal first select a Fixed Asset which has been linked to a Job. The following fields will be filled automatically based in the setup in the Fixed Asset Card.

Note: These fields can also be entered manually in the Fixed Asset G/L Journal when the Fixed Asset is not linked to a Job.

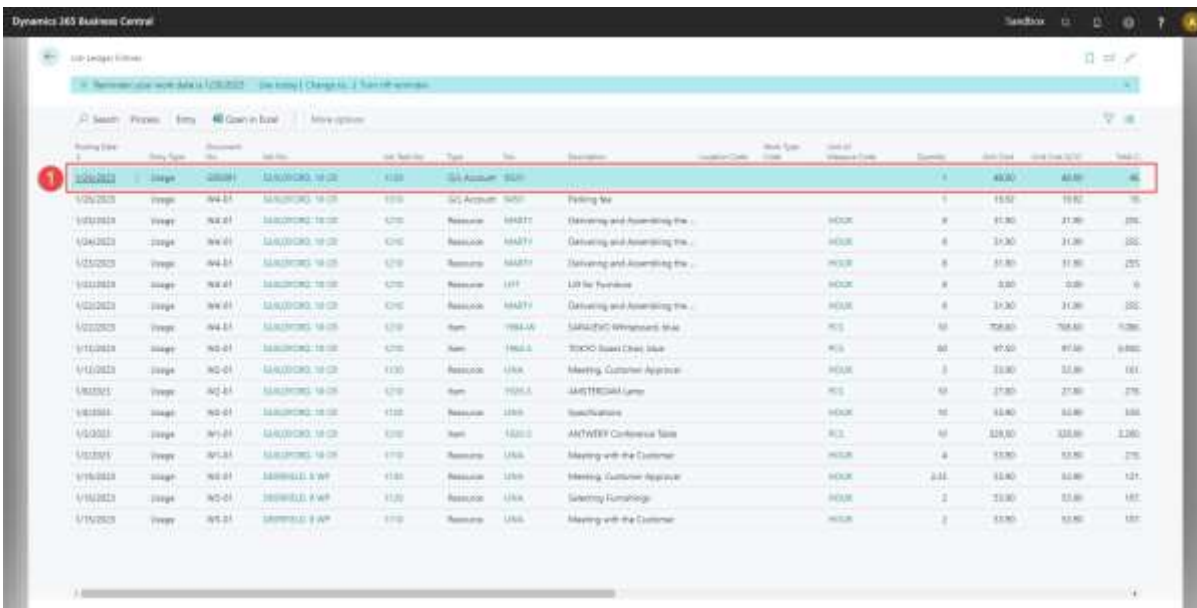
Field	Description
Job No.	Specifies the Job No. to which depreciations will be posted as Job Ledger Entries.
Job Task Line No.	Specifies the Job Task No. for which the Job Planning Line that will be created for the depreciation.
Line Type	Specifies the Line Type for the Job Planning Line that will be created for the depreciation. Usually this will be set as Budget since a depreciation will not be invoiced.
Job Quantity	Specifies the Job Quantity that will be used for the Job Planning Line created for the depreciation. Usually this will be set as 1 as the value of the depreciation must only be charged once to the Job.



Post the Fixed Asset Depreciation in the Fixed Asset G/L Journal using the Post function and select Yes when asked if you want to post the journal lines.



The posting of the depreciation will result in a Job Ledger Entry.



Note: The link to the Job will also be automatically applied when using the Calculate Depreciations function.

10. DATE FILTER

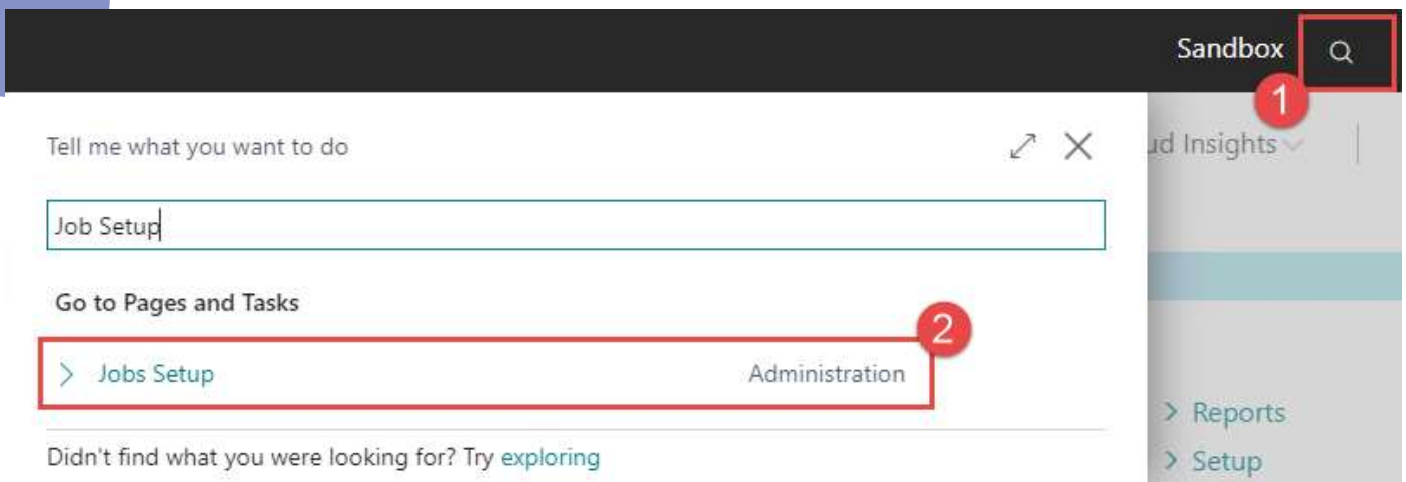
10.1 Description and objective

The Project management – Date Filter functionality creates the possibility to define a standard filter which will be applied to Job Tasks and Job Planning Lines. This way long running projects or contracts can be filtered on the current working period. The standard filter can always be removed or re-applied manually.

10.2 Setup Date Filter

To be able to apply a standard filter on Job Task Lines and Job Planning Lines the Date Filter must be set up first.

Start by navigating to Job Setup using the search function.



In the Job Setup page the following fields are available to set a date range to determine the standard filter for Job Tasks and Job Planning Lines.

Field	Description
Job Line Date Filter From	Specifies the start of the date range for the Job Line Date filter as a date formula.
Job Line Date Filter To	Specifies the end of the date range for the Job Line Date filter as a date formula.

Applying a date ranges with date formulas

Date formulas are used to determine the start and end of the date range. All standard Business Central date formulas can be applied. An explanation on how to handle date formulas can be found in Microsoft's Business Central documentation:

<https://docs.microsoft.com/en-us/dynamics365/business-central/ui-enter-date-ranges>

Example:

This example will show how date formulas can be applied to set a standard filter on the current running year.

The current year in this example is 2021.

Job Line Date Filter From = -CY

Job Line Date Filter To = CY

-CY will evaluate in 2021/01/01 as the start date of the filter range.

CY will evaluate in 2021/12/31 as the end date of the filter range.

This will result in a standard filter in which Job Tasks and Job Planning Lines are shown with a date overlapping in the filter from 2021/01/01 to 2021/12/31.

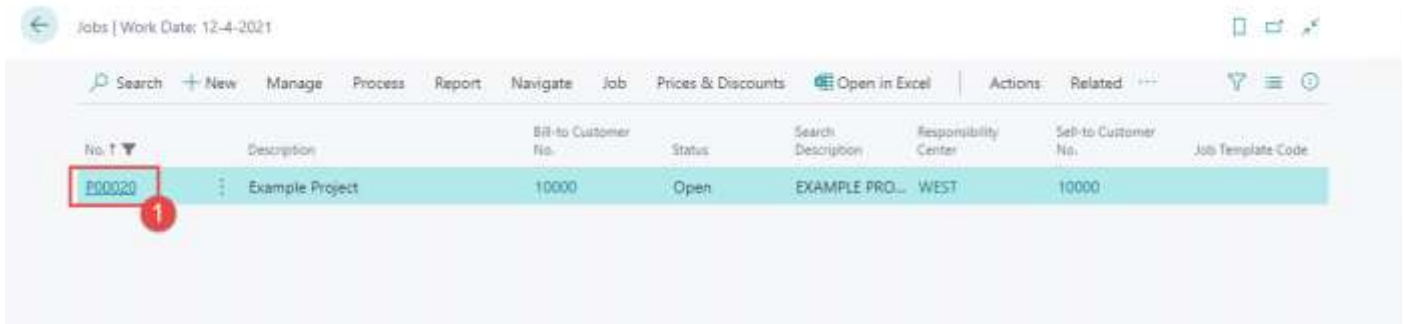
10.3 Applying Job Date Filters in Jobs

To apply and manage Job Date Filters in Jobs, start by navigating to Jobs using the search function.

The screenshot shows the Dynamics 365 search interface. At the top right, the word "Sandbox" is displayed next to a search icon, which is highlighted with a red box and a red circle containing the number "1". Below this, a search bar contains the text "Jobs". Underneath the search bar, there are two main sections: "Go to Pages and Tasks" and "Go to Reports and Analysis". In the "Go to Pages and Tasks" section, the "Jobs" item is highlighted with a red box and a red circle containing the number "2". The "Jobs" item is listed with a right-pointing arrow and the word "Jobs" in blue, followed by "Lists" in grey. Other items in this section include "Jobs Setup" (Administration) and "Integration Synchronization Jobs" (Lists). The "Go to Reports and Analysis" section shows "Jobs per Item", "Jobs per Customer", and "BOMs", all under the category "Reports and Analysis". At the bottom of the search results, there is a link that says "Didn't find what you were looking for? Try exploring".



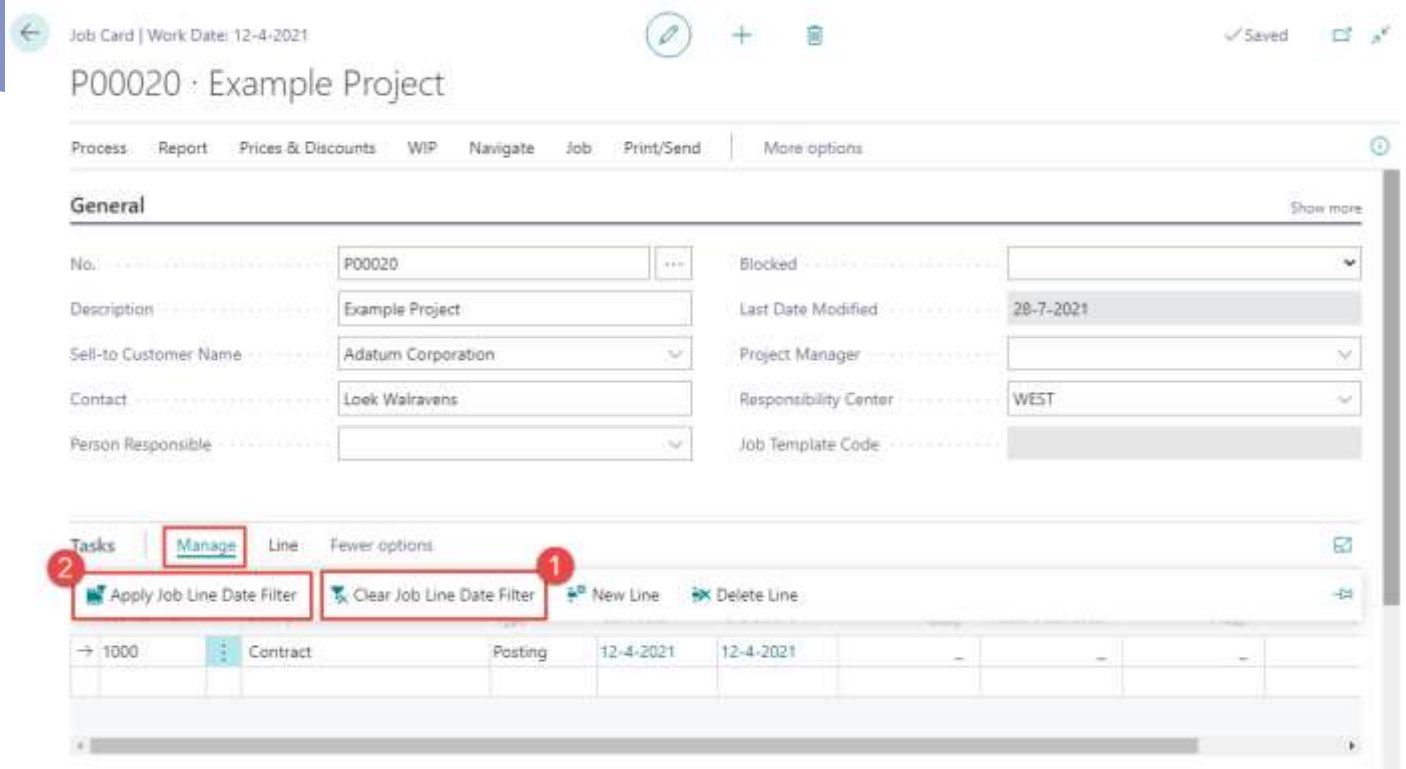
From the Job List page open an existing Job by selecting the Job No.



Manage Date Filters on Job Task level

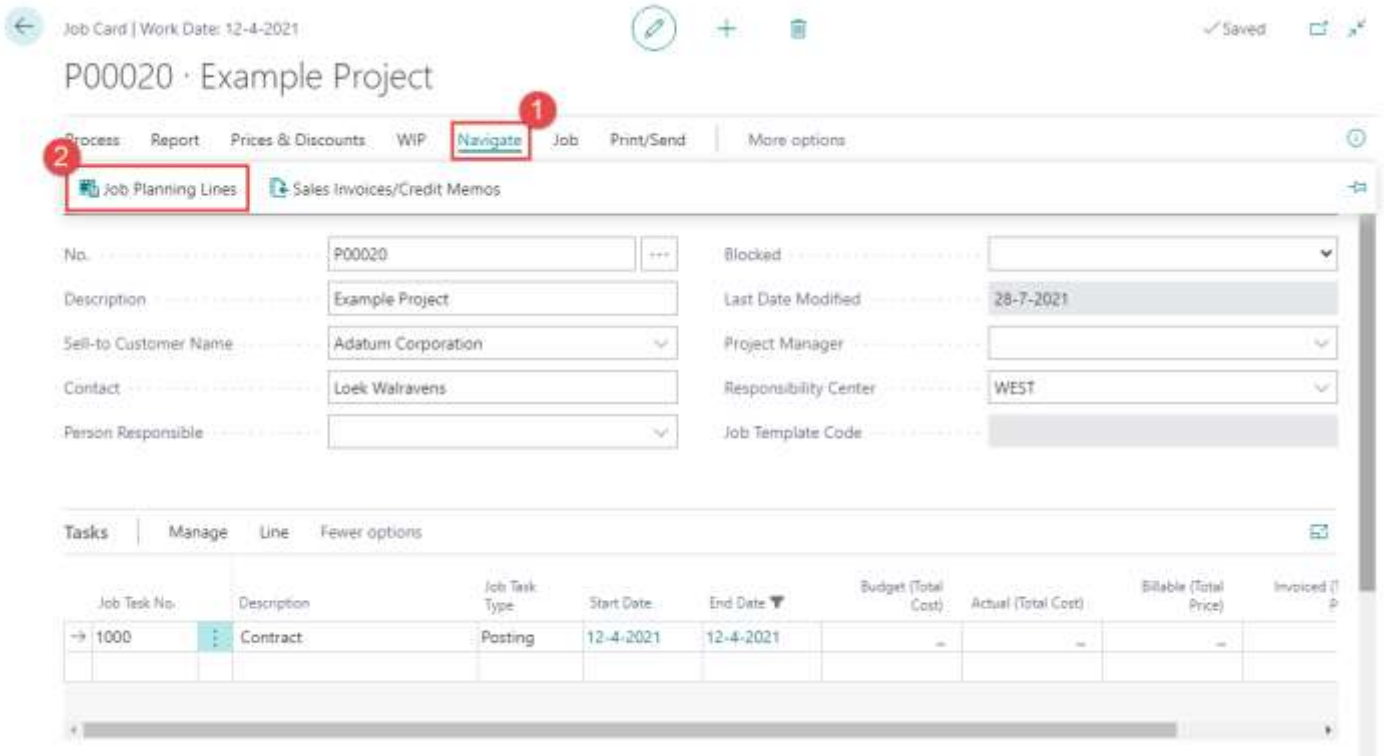
When opening the Job Card the filter in the Job Setup is automatically applied to the Job Tasks. To manage these filters select Manage in the Job Tasks ribbon.

1. The Clear Job Line Date Filter function will clear the set filter on the Job Tasks.
2. The Apply Job Line Date Filter function will (re)-apply the filter from the Job Setup to the Job Tasks.



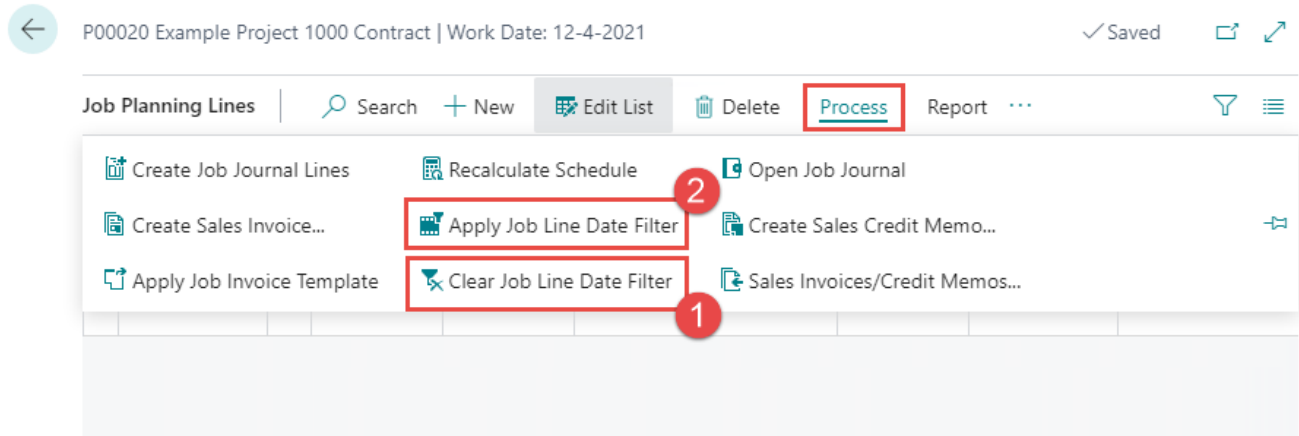
Manage Date Filters on Job Planning Line level

From the Job Card open the Job Planning Lines by selecting Navigate and then Job Planning Lines.



From the Job Planning Line page select Process in the ribbon.

1. The Clear Job Line Date Filter function will clear the set filter on the Job Planning Lines
2. The Apply Job Line Date Filter function will (re)-apply the filter from the Job Setup to the Job Planning Lines





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