Module 1 – ProjectPro Basic

Chapter 02

JOBS SETUP

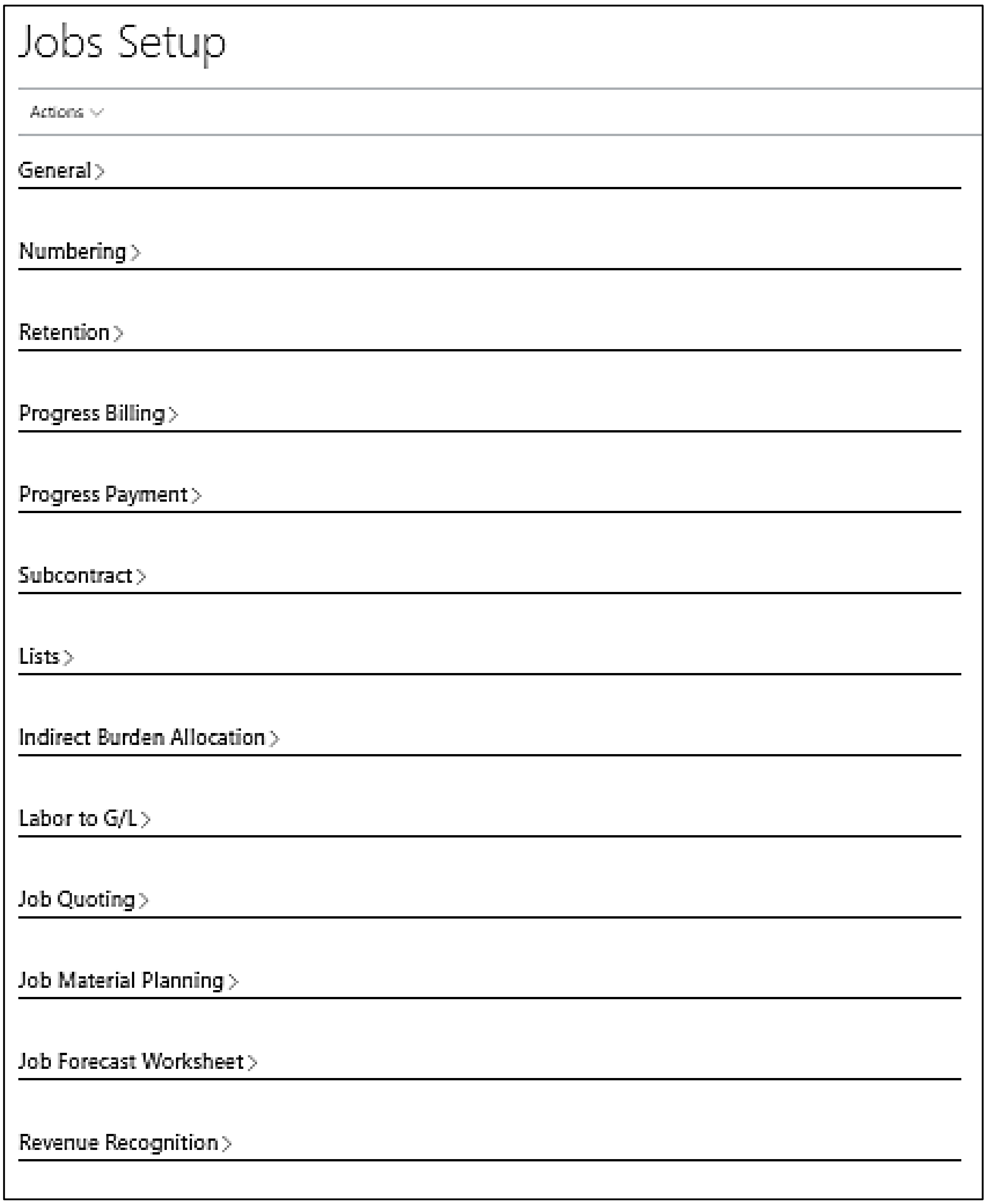
Date	Version	ProjectPro Version	Author
January 24, 2023	1.0	Modified Version	Functional Team

Contents

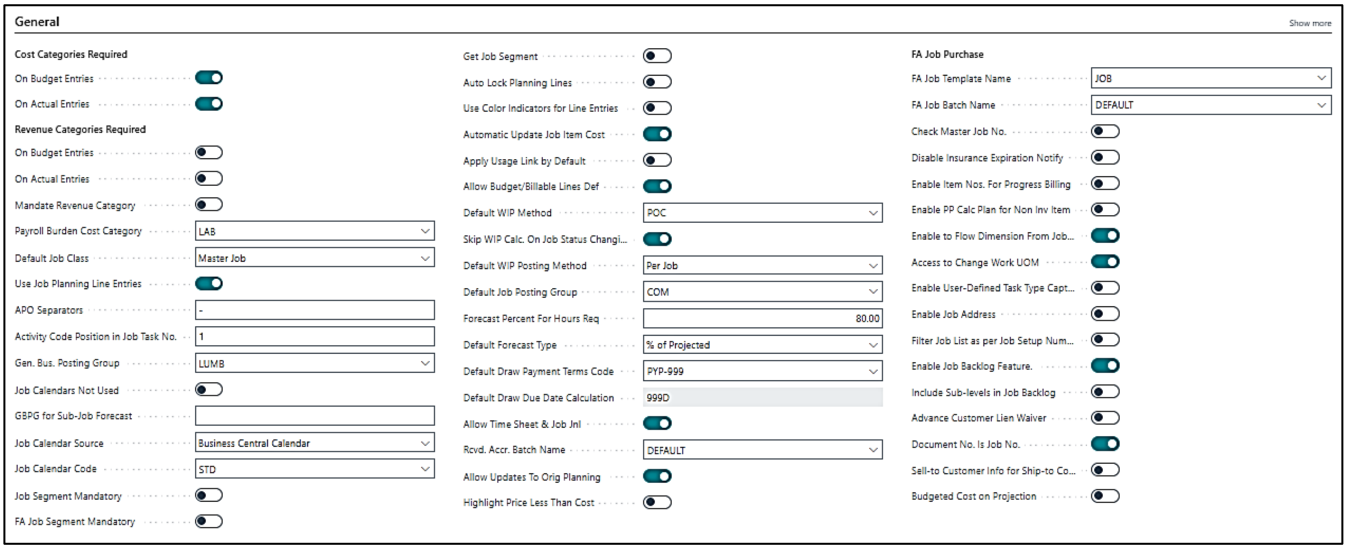
JOBS SETUP

The Jobs Setup page consists of different setups under different fast tabs as shown in the screenshot. Although it is likely that this information will be set up for you during the initial database configuration and set up, you may need to add or adjust this information as your company grows and changes.

Search for “Jobs Setup” from the search icon and click on the relevant option. The below page will open showing all fast tabs.



1. General Fast Tab



FIELD	DESCRIPTION
Cost Categories Required	The “Cost Categories” are strongly recommended for denoting a cost entry to be as “Labor, Equipment, Subcontract, Materials, etc.” as this type of entry does not exist in Standard Business Central. Toggling this option ON will mandate Cost Categories on Budget Entries, Actual Entries, or both.
Revenue Categories Required	Toggling this option ON will require Revenue Categories on Budget Entries, Actual Entries, or both. This requirement is typically off.
Payroll Burden Cost Category	Specify the default Cost Category to be used when applying Payroll Burden.
Default Job Class	Specify the default (optional) Job Class to be updated when creating a new Job such as Master Job, Sub Job, Change Order, etc.
Use Job Planning Line Entries	Enable this field to flow the same G/L Account No. from Job Planning Lines to Sales Document via Progress Billings. Disabling this, the system will follow the same rule to flow G/L Account No. based on the Job Posting Group selected on the Job Task Lines or Job card.
APO Separators	Specify the symbol that will be used to separate the Activity, Process, Operation and Section task codes that make up the “Job Task No.”. Typically, we recommend using a dash (-).
Activity Code Position in Job Task No.	Specifies the position of the Activity Code in a Job Task Number, which is usually at the 1st position.
Gen. Bus. Posting Group	Specifies default General Business Posting Group to be updated on the Job card which will then get populated to Sales Invoice/ Purchase Invoice Document, overriding the Vendor and Customer’s General Business Posting Group.

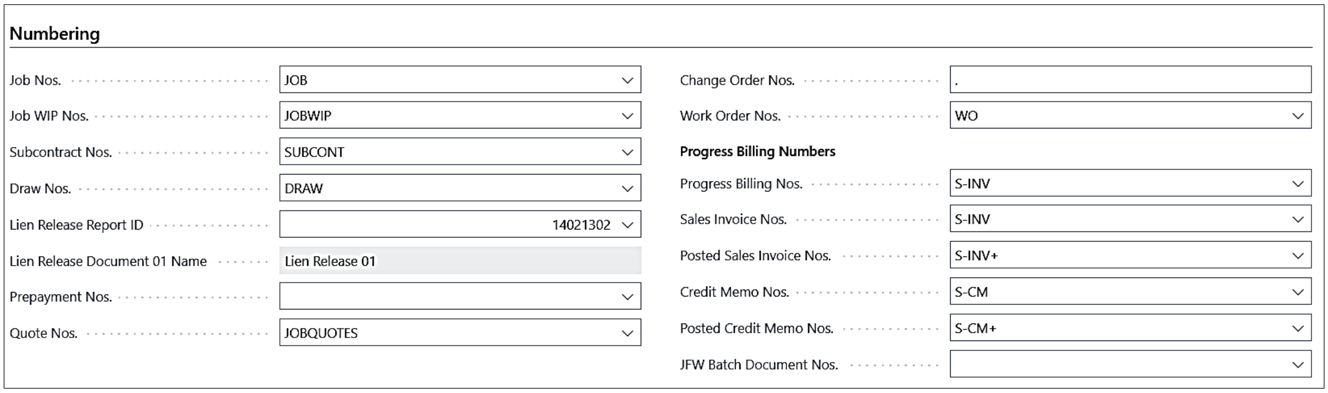
Job Calendar Not Used	Enable this field when Job Calendars are not to be used. Recommend using Business Central default Calendar.
GBPG for Sub-Level Job Forecast	Specifies the General Business Posting Group for the Sub-level Jobs to be included in Job Forecast Worksheet posting (when done from Master Job), Percentage of Completion Report and Project Profit Analysis Report.
Job Calendar Source	Choose the source of the calendar to be as Standard Business Central Calendar or Job Calendar. This field is recommended to be Business Central Calendar.
Job Calendar Code	Select the Calendar Code for Jobs as per the calendar source selected. Usually start with a standard calendar for workdays.
Job Segment Mandatory	Specifies if the Job Segment is mandatory for every transaction related to Job. Segments are another field that can relate “Budget and Billable Job Planning Lines” independent of the Job Task No. field. Initially, “Segment” was thought of as the “Bid Item” reference.
FA Job Segment Mandatory	Specifies that FA Job Segment is mandatory on Purchase Documents for Job and FA related entries together. Where the FA is “Fixed Asset”.
Get Job Segment	Specifies that the system will carry the Segment from Master Job to Sub-Levels Jobs.
Auto Lock Planning Lines	Enable this to auto lock the planning lines when converting the Job Quote to Job. This will add all the planning lines populated from Job Quote to “Job Planning Lines (Locked)” page. This will then be visible as Locked (Cost) under Job Budget/Billable fast tab on Job card. This represents the “Original” budget and billable “Contract” values when the job was established.
Use Color Indicators for Line Entries	Enable to highlight the amount in Red on Purchase Order or Subcontract lines when it exceeds the cost defined on respective Job Planning Lines. This will also highlight the "Actual Cost" and the "Invoiced Price" amounts on the Job Task Lines, when they get exceeded by the "Budgeted Cost" and the "Billable Price", respectively.
Automatic Update Job Item Cost	Specifies that cost changes are automatically adjusted each time the “Adjust Cost - Item Entries” Batch Job is run. The adjustment process and its results are the same as when you run the “Update Job Item Cost” Batch Job. Recommended to be "ON".
Apply Usage Link by Default	By default, the 'Job Ledger Entries' are linked to 'Job Planning Lines'. If enabled, this will apply to all new Jobs created. Recommended to be "OFF" and can used on a Job-by-Job basis. This is a way of knowing on a specific job planning line what the quantities are in relation to the job ledger entries of actual purchases. Because of the way many budgets are based on value of a Job Task instead of a specific Item, usually the “Apply Usage Link” is OFF. This feature would be ON for “Time & Material” jobs.
Allow Budget/Billable Line Def.	By default, Job Planning Lines will be of type “Both Budget and Billable”. If enabled, this will apply to all new Jobs created. Recommended to be "OFF" and can used on a Job-by-Job basis.

Default WIP Method	Specifies the default method to be used for calculating work in process (WIP). It is applied whenever you create a new Job, but you can modify the value on the Job card. In ProjectPro it is kept as POC, but ProjectPro does not use the Business Central "WIP Method".
Skip WIP Calc. On Job Status Changing	If enabled, the WIP message will not appear after changing the Status of the Job under the "Constant/Manager" fast tab on the Job Card. Please note that WIP messages will only skip if no WIP Entries exist for the same job.
Default WIP Posting Method	Specifies how the default WIP method is to be applied when posting Work in Process (WIP) to the general ledger. By default, it is applied "Per Job" but can be changed to "Per Job Ledger Entry".
Default Job Posting Group	Specifies the default posting group to be applied when you create a new Job. This group is used whenever you create a Job, but you can modify the value on the Job card.
Logo Position on Document	Specifies the position of your company logo on business letters and documents. It can be set to Left, Right, Centre, or No Logo.
Forecast Percentage for Hours Req.	Indicates at what percent of your budget should trigger hours to finish by project managers. Example, If the Forecast Percentage is set at 80%, when actual cost exceeds 80% of budget, then the hours to finish field is required to be filled in on the Job Forecast Worksheet.
Default Forecast Type	Select the type of Job Forecast calculations based on % of Budget or % of Projected. % of Projected is the recommended option, if using the Job Forecast tool.
Default Draw Payment Terms Code	Specifies the default payment terms to be set for vendors as a default when using "Pay when Paid" business process. The "Pay when Paid" is the term of paying your vendors when your customer pays you. This is typically set in ProjectPro with the one set to "999D" due date calculation. This will get updated on the purchase documents when a Draw No. is selected.
Default Draw Due Date Calculation	Specifies default due date calculation based on Payment Terms Code selected above.
Allow Time Sheet & Job Jnl.	This enables a User to enter Resource's time either directly through the Job Journal or employee can enter their own Timesheet if their Resource Card is set to "Allow Time Sheet Entry".
Rcvd. Accr. Batch Name	Specifies the Rcvd. Accr. Batch Name. This the Journal Batch to be used to create Received Not Invoiced items to "Accrue Costs at Month End".
Allow Updates to Orig. Planning	This will allow the QTY & Rate on the Planning Lines to be changed - even after the Purchase Order has been generated.
Highlight Prices Less Than Cost	Will highlight the planning lines in red, italicized font to indicate that your price is less than your cost.
FA Job Template Name	Specifies the Job journal template to purchase FA (Fixed Assets) with Job.

FA Job Batch Name	Specifies the Job journal batch based on the template selected on prior field.
Check Master Job No.	If enabled, when creating a Sub-Job from a Master Job card, only Job Task Lines from the Master Job will be available to copy over.
Disable Insurance Expiration Notify	Toggle “on” or “off” to enable notification of vendor insurance expiration.
Enable Item No. For Progress Billing	Toggling it “on” means that in Progress Billing, type Item will be updated in the line instead of the G/L Account no. Toggling it “off” means that in Progress Billing, type G/L will be updated in the lines from Job Posting Setup.
Enable PP Calc Plan for Non-Inv. Item	Toggle it “on” or “off” based on whether you want to include noninventory items in the PP Calculate Plan function in Requisition Worksheet.
Enable to Flow Dimension from Job Card	Toggle it “on” or “off” based on whether you want to update the dimensions from Job card or from default General ledger setup.
Access to Change Work UOM	Specifies if user can change the Work UOM on Job Task Lines having Job Ledger Entries associated with it.
Enable User-Defined Task Type Caption	Allows them to use their own naming convention for Job Tasks, i.e., APOS namely "Activities", "Process", "Operations", and "Section". This is a company-wide naming of the Job Tasks levels.
Enable Job Address	Specifies that the address from the Job Card will be the Ship to Address in Purchase Order.
Enable Job Backlog Feature	If enabled, the closing of “Parent” or “Master” Jobs will be dependent upon whether all its sub-level Jobs are closed prior. The user will be alerted if there exists “Open” sub-level Jobs, preventing the closing until all sub-level Jobs are set to “Completed”. Note: The “Manager Status” of the job must be set to “Running”, for it to be included in the open job backlog calculations.
Include Sub-levels in Job Backlog	If enabled, the Master Job will show combined value (Master + Sub-Levels) under the “Open Job Backlog” column on the Jobs list, while the sub-levels will be shown with their individual Backlog values as well. Note: The “Manager Status” of the job must be set to “Running”, for it to be included in the open job backlog calculations.
Advance Customer Lien Waiver	Enable this feature to use advance level of Customer Lien Waivers. When set to True, it will disable the two fields on Customer Ledger Entries, "Lien Waiver Amount" and "Lien Waiver Payment". Then the reporting features will track any “Open” and unpaid customer invoices for reporting on future Customer Lien Waivers.
Document No. Is Job No.	Specifies that the Job number is also the document number in the ledger entries posted for the Job.
Sell-to Customer Info for Ship-to Code	If enabled, the Sell-to Customer information will be set to default for Ship-to Code/details on General fast tab of the Job card. By default, the Ship-to Code/details gets updated with Bill-to Customer information.

Budgeted Cost on Projection	Enabling this Boolean will check the Job Planning Lines with Line Type not equal to Billable and picks the Total Cost LCY on Projections fast tab into the field Budget Total Cost under Actual column on Job Card.

2. Numbering Fast Tab

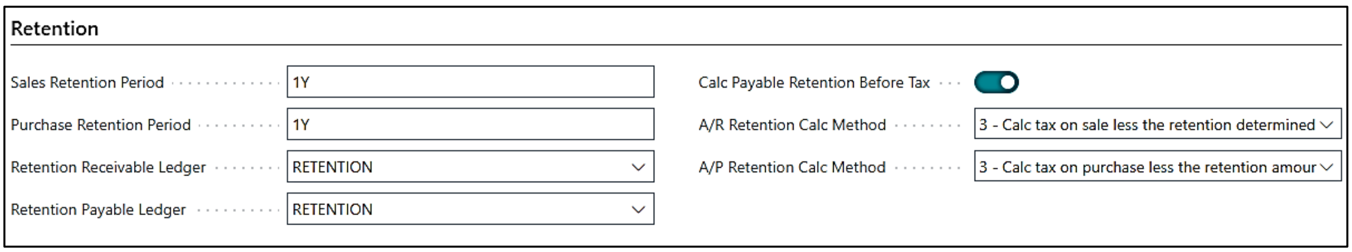


FIELD	DESCRIPTION
Job Nos	Specifies the code for the Job number series which will be used in Jobs.
Job WIP Nos.	Specifies the code for the Job WIP number series which will be used in Job WIP.
Subcontract Nos.	Specifies the code for the Subcontract number series which will be used in Subcontracts.
Draw Nos.	Specifies the code for the Draw number series that will be used in Draw.
Lien Release Report ID	Enter the report number for the Lien Release Report. This is the Vendor (Subcontractor) Lien Release document.
Lien Release Document 01 Name	The Lien Release Report name displays from the ID entered.
Prepayment Nos.	Enter the Prepayment No. series CODE. See "No. Series" Table.
Quote Nos.	Enter the Quote No. series CODE. See "No. Series" Table.
Change Order Nos.	Specifies the code for the number series that will be used assign numbers to Change Orders created from Master Job. To see the number series that have been setup in the No. Series table.
Work Order Nos.	Enter the Work Order No. series code.
Progress Billing Nos.	Enter the Progress Billing No. series code. Most often the Progress Billing is the Master Job No.
Sales Invoice Nos.	Enter the Sales Invoice No. series code for Progress Billing
Posted Sales Invoice Nos.	Enter the Posted Sales Invoice No. series code for Progress Billing

Credit Memo Nos.	Enter the Credit Memo No. series code for Progress Billing
Posted Credit Memo Nos.	Enter the Posted Credit Memo No. series code for Progress Billing
JFW Batch Document Nos	Specifies the number series used for Batch Document Nos. on job forecast worksheet on running “Batch Posting for Job Forecast Worksheets”.

3. Retention Fast Tab

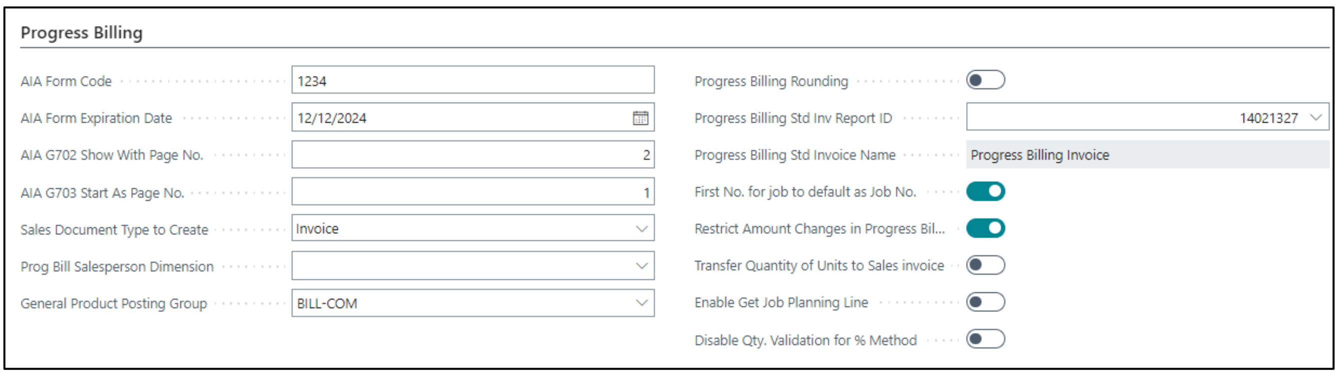
Once you have determined if your company will be using retainage receivables and /or payables, you must establish the Sales Retention and Purchase Retention Periods.



FIELD	DESCRIPTION
Sales Retention Period	Represents the aging of the retention portion of the receivable. Example: The ‘1Y’ means one year from the document date for establishing retention receivable due dates.
Purchase Retention Period	Represents the due date for the retainage portion of the vendor invoice.
Retention Receivable Ledger	Select the Retention Ledger for Retention Receivables. This is the standard selection for retention receivable tracking. Most set as “Retention”.
Retention Payable Ledger	Select the Retention Ledger for Retention Payables. This is the standard selection for retention payable tracking. Most set as “Retention”.
Calc Receivable Retention Before Tax	Check this box if you prefer to have retention receivables calculated before tax is assessed.
A/R Retention Calc Method	Out of the options available select the one that aligns best with your business practices. Option 3 is the suggested option for ProjectPro. 1. **Calc tax on sale then apply a retention value based on taxed sale amount** – In this option Retention is calculated on the Amount Including Tax and then Retention is calculated. 2. **Calc tax on sale then apply retention determined by progress billing –** In this option Retention is calculated on the Line Amount (Without Tax) but tax is calculated on the full value of taxable progress billing lines. 3. **Calc tax on sale less the retention determined by progress billing** – In this option Retention is calculated on the Line Amount (Without Tax) and then tax Calculated online Amount – Retention Amount.

A/P Retention Calc Method	Out of the options available select the one that aligns best with your business practices. Option 3 is the suggested option for ProjectPro. 1. **Calc tax on purchase then apply a retention value based on taxed purchase amount** – In this option Retention is calculated on the Amount Including Tax. 2. **Calc tax on purchase then apply retention amount** – In this option Retention is calculated on the Line Amount (Without Tax). 3. **Calc tax on purchase less the retention amount** – In this option Retention is calculated on the Line Amount (Without Tax) and then tax Calculated online Amount – Retention Amount.

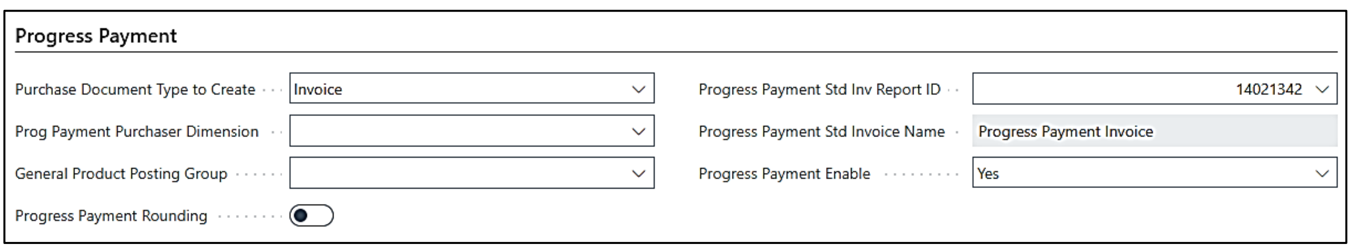
4. Progress Billing Fast Tab



FIELD	DESCRIPTION
AIA Form Code	Enter your AIA (American Institute of Architects) license (subscription no.) to print G702 and G703 pages.
AIA Form Expiration Date	Enter your AIA license (subscription no.) expiration date.
AIA G702 Show with Page No.	Enter the page number if desired on the AIA G702 report. Usually starts with 1.
AIA G703 Start as Page No.	Enter the start page number if desired on the AIA G703 report. Usually starts with 2.
Sales Document Type to Create	This is the setting for whether you want the progress billing to create either a Customer Sales Order or a Customer Sales Invoice. Usually this is set to “Customer Sales Invoice”.
Prog. Bill Salesperson Dimension	Specifies the default dimension for Salesperson on the Progress Billing.
General Product Posting Group	Sets a default General Product Posting Group that is used during the Customer Invoice process. If not required, then the Job Posting Group is used.

Progress Billing Rounding	Select this option if you would like to default on all progress billing sales amounts to nearest whole dollar. This can also be selected on progress billings for individual billings.
Progress Billing Std Inv. Report ID	Enter the report number for a standard Invoice. The ProjectPro default report number is 14021327
Progress Billing Std Inv. Report Name	Automatically updates the name of the report entered above.
First No. For Job to Default as Job No.	Enable to have the Job No. match your Progress Billing No.
Restrict Amount Changes in Progress Billing Invoice	
Transfer Quantity of Units to Sales Invoice	If enabled and the Billable Planning line is set to Billing Method of "Units", then Quantity being billed is transferred to the Sales Document. If disabled, then only the Quantity of 1 is transferred.
Enable Get Job Planning Line	Enable to use "Get Job Planning Lines" function on the progress billing form. This feature will allow a user to select one or more Billable Job Planning Lines for the progress billing. Enabling this feature will disable the standard "Get Billings" function on the progress billing.
Disable Qty. Validation for % Method	Specifies if the user can put Quantity more than 1 on billable job planning lines when "Progress Billing Method = %".

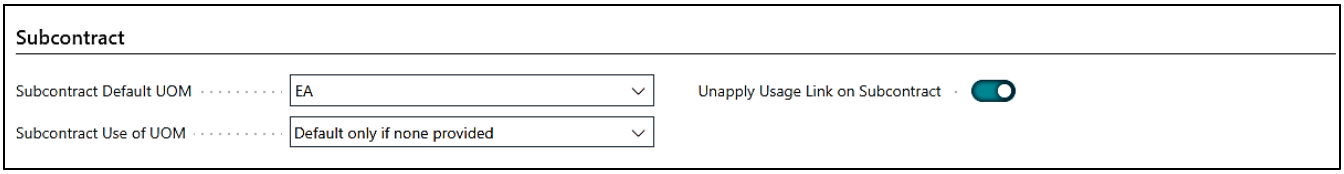
5. Progress Payment Fast Tab



FIELD	DESCRIPTION
Purchase Document Type to Create	This is the setting for whether you want the progress payment to create either a Vendor Purchase Order or a Vendor Purchase Invoice.
Prog. Payment Purchaser Dimension	Default dimension to be taken for Purchaser in case of Progress Payment
General Product Posting Group	Sets a default General Product Posting Group that is used during the Vendor Invoice process.
Progress Billing Rounding	Select this option if you would like all progress payment amounts to be rounded to the nearest whole dollar.
Progress Billing Std Inv. Report ID	Enter the report number for a standard Payment. The ProjectPro standard report is 14021342

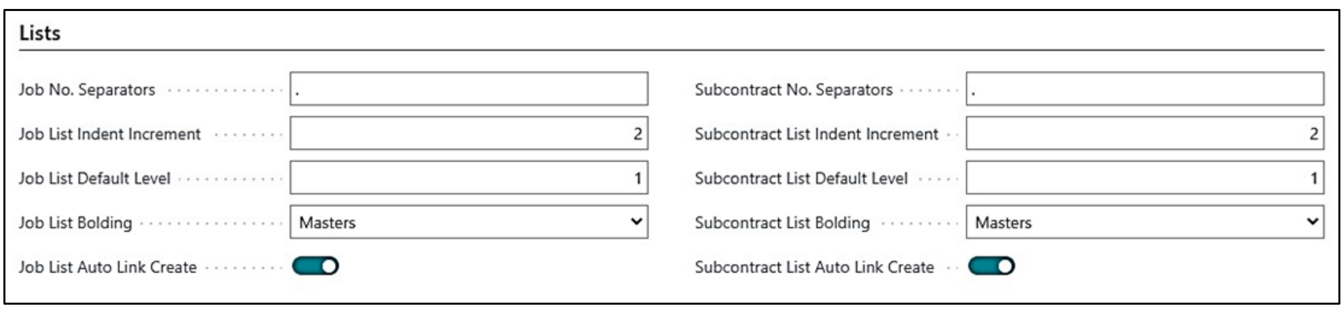
Progress Billing Std Inv. Report Name	Automatically updates the Name of The Report selected above.
Progress Payment Enable	Toggle to unable Progress Payment in Subcontract Order.

6. Subcontract Fast Tab

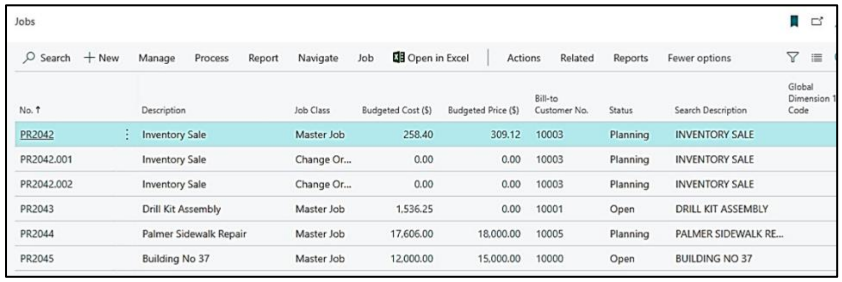


FIELD	DESCRIPTION
Subcontract Default UOM	Select the default UOM for all subcontracts.
Subcontract Unit of UOM	Select the best suitable option for Subcontract use of UOM.
Un-apply Usage Link on Subcontract	Toggle this “ON” if you don’t want to use usage links related to Subcontracts. Recommend this be set to ON as most Job Planning Lines do not match the transactions with subcontractors.

7. Lists Fast Tab



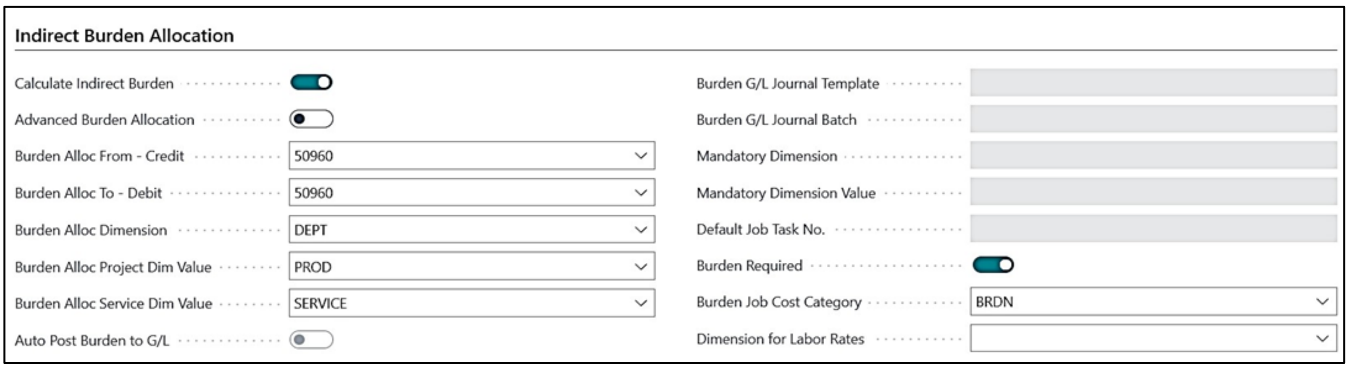
FIELD	DESCRIPTION
Job No. Separators	Enter the symbol used to differentiate Master Jobs from Sub-Level Jobs. Example: if “.” is used, then 9600 (Master Job) and 9600.01 (Sub Job)
Job List Indent Increment	Specify the Increment for indentation when viewing Sub-Level Jobs from Master Jobs on Job List View.
Job List Default Level	Indicates how many levels of Job sub-levels you want the list to default too. See sample list below.



No.	Description	Job Class	Budgeted Cost ($)	Budgeted Price ($)	Bill-to Customer No.	Status	Search Description	Global Dimension 1 Code
PR2042	Inventory Sale	Master Job	258.40	309.12	10003	Planning	INVENTORY SALE	
PR2042.001	Inventory Sale	Change Or...	0.00	0.00	10003	Planning	INVENTORY SALE	
PR2042.002	Inventory Sale	Change Or...	0.00	0.00	10003	Planning	INVENTORY SALE	
PR2043	Drill Kit Assembly	Master Job	1,536.25	0.00	10001	Open	DRILL KIT ASSEMBLY	
PR2044	Palmer Sidewalk Repair	Master Job	17,606.00	18,000.00	10005	Planning	PALMER SIDEWALK RE...	
PR2045	Building No 37	Master Job	12,000.00	15,000.00	10000	Open	BUILDING NO 37	

Job List Bolding	Select what level will be displayed in bold when Job List is displayed.
Job List Auto Link Create	This should always be ON. This enables a Job list table to be populated with the links between the various Job classes.
Subcontract No. Separators	The symbol used to differentiate *Master Subcontractor* from *Sub-Level*. Example SUB101, SUB101.01, SUB101.02, etc.
Subcontract List Indent Increment	The view of indented sub-level Jobs under master Jobs.
Subcontract List Default Level	Indicates how many levels of subcontract sub-levels you want the list to default too. See sample list below.
Subcontract List Bolding	Indicates what level is displayed in bold, if any.
Subcontract List Auto Link Create	This should always be ON. This enables a subcontract list table to be populated with the links between the various Job classes.

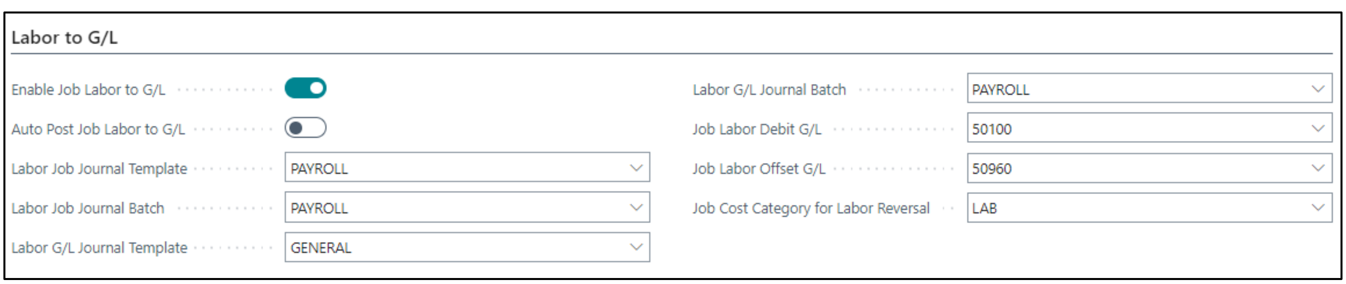
8. Indirect Burden Allocation Fast Tab



FIELD	DESCRIPTION
Calculate Indirect Burden	If enabled, the Indirect Burden will be calculated on the Jobs, based on Burden % defined on a specific Job Task Line. This will only update Job Ledger Entries.
Advanced Burden Allocation	If enabled, in addition to Indirect Burden, the Calculated Burden amount will also be updated on the G/L account through a Batch Job.
Burden Alloc. From – Credit	Select the credit G/L account for burden allocation. This G/L account is usually from the “Indirect Job Cost” section of your Chart of Accounts.

Burden Alloc. To – Debit	Select the debit G/L account for burden allocation. This G/L account is usually from the “Direct Job Cost” section of your Chart of Accounts.
Burden Alloc. Dimension	Select the dimension for burden allocation. This indicates which dimension is being used for burden.
Burden Alloc. Project Dim Value	Based on the dimension above, set the project dimension value
Burden Alloc. Service Dim Value	Based on the dimension above, set the service dimension value
Auto Post Burden	Specifies that you would like burden to be automatically posted to your G/L account when toggled “on”
Burden G/L Journal Template	Specifies the Burden G/L Journal Template to be used. This is only available if you are using Advanced Burden Allocations.
Burden G/L Journal Batch	Specifies the Burden G/L Journal Batch to be used. This is only available if you are using Advanced Burden Allocations.
Mandatory Dimension	Specifies the Dimension to be mandatory while processing the Subcontracts. This is only available if you are using Advanced Burden Allocations.
Mandatory Dimension Value	Specifies the Dimension Value to be mandatory while processing the Subcontracts. This is only available if you are using Advanced Burden Allocations.
Default Job Task No.	Specifies system should ask the Default Job Task No. while processing the Subcontract. This is only available if you are using Advanced Burden Allocations.
Burden Required	Turn ON if burden is required for all Jobs.
Burden Job Cost Category	Select the Job cost category for Burden calculations.
Dimension for Labor Rates	If you are requiring a dimension for Labor Rates, please specify here.

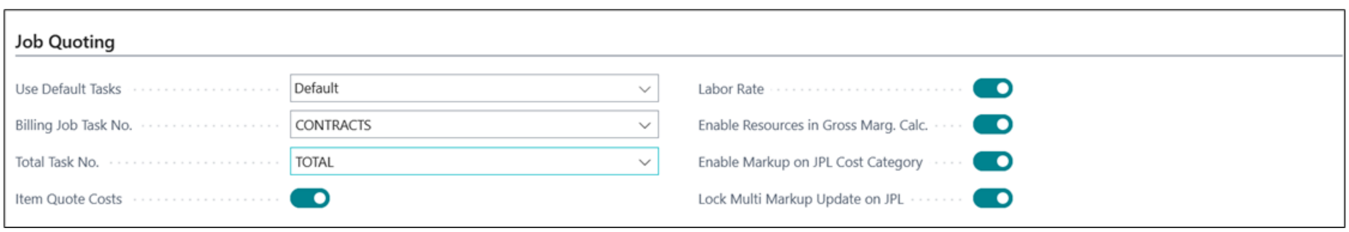
9. Labor to G/L Fast Tab



FIELD	DESCRIPTION
Enable Job Labor to G/L	If enabled, the Labor entries posted from the Job Journal Batch (defined in the below setups) will flow to the defined General Journal Batch, where you can review the entries before posting them to G/L entries.
Auto Post Job Labor to G/L	Enable this to automatically post the Labor entries created on the Job Journal to G/L entries.

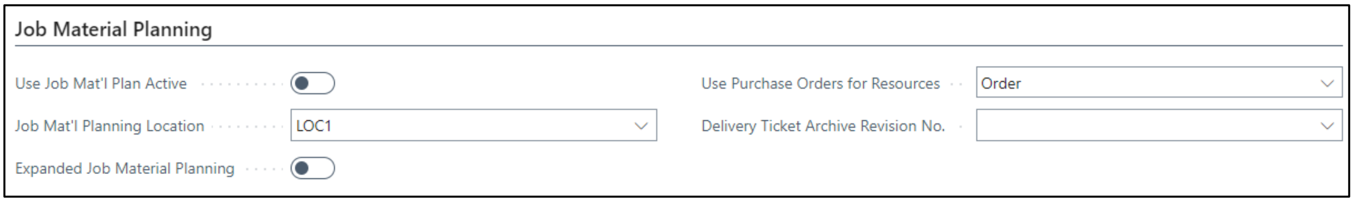
Labor Job Journal Template	Specifies the job journal template name for creating the Job Labor entries that should be posted to G/L.
Labor Job Journal Batch	Specifies the job journal batch name based on the Job Journal Template selected above for creating the Job Labor entries
Labor G/L Journal Template	Specifies the general journal template name to which the Job Labor entries will get populated from the Job Journal when posted.
Labor to Job Batch Name	Specifies the general journal batch name based on the G/L Journal template selected above to which the Job Labor entries will get populated from Job Journal when posted.
Job Labor Debit G/L	Specifies the debit G/L account for job labor allocation to G/L entries.
Job Labor Offset G/L	Specifies the credit G/L account for job labor allocation to G/L entries.
Job Cost Category for Labor Reversal	Specifies the Job Cost Category to be used for posting reversals of job labor entries.

10. Job Quoting Fast Tab



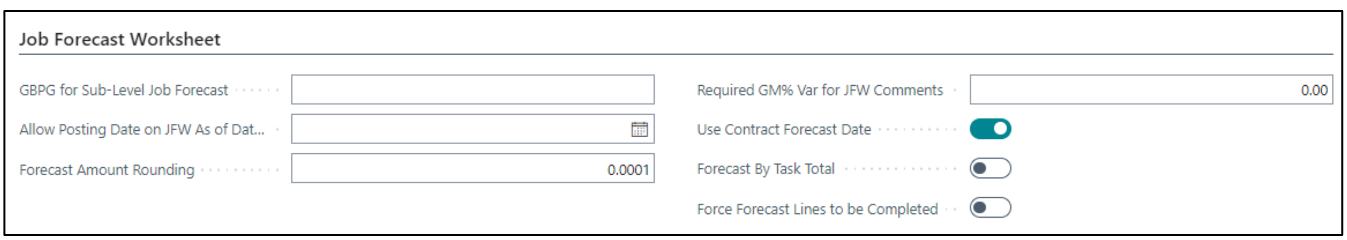
FIELD	DESCRIPTION
Use Default Tasks	If you want to use default Job task lines on each new Job and Job quote creation, select the required option.
Billing Job Task Nos.	Define the billing Job task number you would like to default on each Job.
Total Task Nos.	Define the Task to be used for totaling for the Job.
Item Quote Costs	Toggle it "on" or "off" to select cost from Quote cost field from Item Card
Labor Rate	Toggle it "on" or "off" to select Labor rate based on Job type for the type – Person as defined in Labor by Task page
Enable Resources in Gross Marg. Calc.	Specifies the system calculates the Markup% on Job Tasks for the Resource.
Enable Markup on JPL Cost Category	Specifies the Markup will be updated on the Job Planning Line based on the value or % specified on the Cost Category.
Lock Multi Markup Update on JPL	Specifies user can only update the Markup calculation on the Job Planning Line only once.

11. Job Material Planning Fast Tab



FIELD	DESCRIPTION
Use Job Mat'l Plan Active	Enable to use the Job Material Planning feature to plan and track Materials/Items on ordered.
Job Mat'l Planning Location	To set a default location for Job Material Planning select from your locations list in the drop down.
Expanded Job Material Planning	If enabled, the G/L account must be specified on the Job Material Planning Worksheet.
Use Purchase Orders for Resources	Select "Order" or "Invoice" to specify option for the Purchase Document type when creating from JMP ('Purchase Order' or 'Purchase Invoice').
Delivery Ticket Archive Revision No.	Specify the No. Series for generating Archived Delivery Ticket.
Lock JPL lines for PO	This field facilitate the user to cross check JPL while creating the PO from subcontract and JMP or response to the same JPL

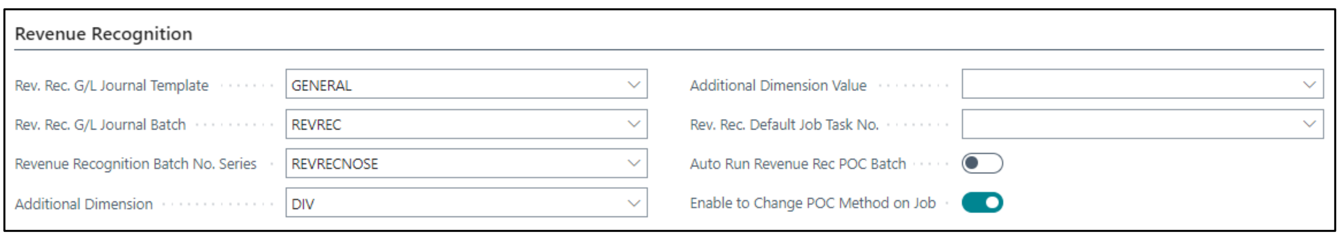
12. Job Forecast Worksheet Fast Tab



FIELD	DESCRIPTION
GBPG for Sub-Level Job Forecast	This field is recommended to be left blank. Only enter a General Business Posting Group (GBPG) if you wish to require all Sub-Level Jobs to have this GBPG code to be included during Job Forecasting.
Allow Posting Date on JFW As of Date Filter	If a date is entered, this date becomes the only "As of Date" for the Job Forecast Worksheet. This will require the Construction Manager to change the date before the next Forecast period. Typically, this is a monthly process. If left blank, there's no restriction for the PM Forecasting date.
Forecast Amount Rounding	This allows you to identify to what decimal you would like forecasts rounded to. ProjectPro suggests 0.01 as the setting.

Required GM% Var. for JFW Comments	Enter the GM% that will trigger a notification that a comment must be entered to explain the variance in month-to-month GM%
Use Contract Forecast Date	Specifies if you want to use the "Contract Forecast Date" available on the job planning lines, as a date filter for Job Forecasting. When disabled, the standard "Planning Date" from the job planning lines is applied. This Contract Forecast Date features become more valuable when you are making additional forecast changed directly in the Master Job's planning lines. Becomes more important as to what date changes to forecast where made.
Forecast By Task Total	The user can prepare Job Forecast by using summarized Job Task Type 'End-Total' instead of Forecasting by each individual Job Task lines that is 'Posting'.
Force Forecast Lines to be Completed	Specify if you want to force the forecast worksheet to be set as "Completed". This feature is used only when an upgrade/implementation is performed along with the import of historical data and there is a case where the Percentage Complete exceeds 100%. If this Boolean is true during the import, the system will auto-set those forecast lines to "Completed".

13. Revenue Recognition Fast Tab



FIELDS	DESCRIPTION
Rev. Rec. G/L Journal Template	Specifies the default General Journal Template to be used for the posting of Revenue Recognition entries.
Rev. Rec. G/L Journal Batch	Specifies the default General Journal Batch as per template selected above to be used for the posting of Revenue Recognition entries.
Revenue Recognition Batch No. Series	Specifies the default No. Series to be used for the reversal entries.
Additional Dimension	Specifies the default Dimension Code to be used for every revenue recognition entry when posted to G/L in addition to the existing dimensions on Job.
Additional Dimension Value	Specifies the Dimension Value as per code selected above to be used for every revenue recognition entry when posted to G/L in addition to the existing dimensions on Job.
Rev. Rec. Default Job Task No.	Species the default Job Task No. to be used at the backend for the posting of General Journal.

Auto Run Revenue Rec POC Batch	Specifies if you want the batch "Calculate Revenue Recognition" to run automatically on the Revenue Recognition Summary Details page. Please note that, this will create entries with “Entry Type = Finance” if created via “Batch Posting for Job Forecast Worksheet”.
Enable to Change POC Method on Job	If enabled, you will be able to change the “POC Method” on the job card, even if the Revenue Recognition Summary Details exist for the same.