



**Module 04 – Job Material Planning**  
**Chapter 01**  
**JOB MATERIAL PLANNING PROCESS**

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## Job Material Planning for ProjectPro Dynamics-BC

### JOB MATERIAL PLANNING

Job Material Planning (JMP) in ProjectPro allows users to plan and manage procurement of items and resources for a given job.

On the Job card make sure the **Use Job Material Planning** option is toggled “on”.

Job Card

J01490 · Building Construction

Home Prices & Discounts WIP Job Navigate Report Analytics Actions Related Automate Fewer options

**General** Show more

No. J01490 WIP Posting Date

Description Building Construction Job Phone

Sell-to Customer No. 10012 DFR Nos.

Sell-to Customer Name Haynes Contracting Corp. Customer Name Haynes Contracting Corp.

Salesperson Code Salesperson Name

Contract No. Contract Date 10/13/2023 Blocked

Contract For Building Construction Last Date Modified 10/13/2023

Contract Type Contract Sell Price 0.00 Cust. PO No. Cust. Job No. Ship-to Code

Use Job Material Planning

#### 1. Schedule JMP Requisition Worksheet for Jobs

Also review your Job Planning Lines to confirm you have budget or budget and billable lines entered. JMP will only work for Budget/Both Budget and Billable lines with items and resources.

Line Job Description	Line Type	Planning Date	Contract Forecast Date	Planned Delivery Date	Document No.	Type	No.	Description	Cost Category	Progress Billing Method	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount
→ Building Construction	Budget	10/13/2023	10/13/2023	10/13/20...		Resource	SVJSSPROJIM...	Project Manager	LAB		20	150.00	3,000.00	200.00	4,000.00
Building Construction	Budget	10/13/2023	10/13/2023	10/13/20...		Resource	CABLING	Cabling Installer	LAB		25	120.00	3,000.00	150.00	3,750.00
Building Construction	Budget	10/13/2023	10/13/2023	10/13/20...		Resource	E-580BH	580 Backhoe	EQP		30	100.00	3,000.00	120.00	3,600.00
Building Construction	Budget	10/13/2023	10/13/2023	10/13/20...		Item	AGOSSTN	Crushed Stone #2	MAT		100	70.00	7,000.00	100.00	10,000.00
Building Construction	Budget	10/13/2023	10/13/2023	10/13/20...		Item	BM422659	4' Aluminum Ste...	EQP		120	130.00	15,600.00	170.00	20,400.00
Building Construction	Budget	10/13/2023	10/13/2023	10/13/20...		Item	CT00503	3000 PSI Concer...	MAT		140	110.00	15,400.00	130.00	18,200.00

To begin the Job Material Planning, select Process from the ribbon and select Job Material Planning.

Job Card

J01490 · Building Construction

Home Prices & Discounts WIP Job Navigate Report Analytics Actions Related Automate Fewer options

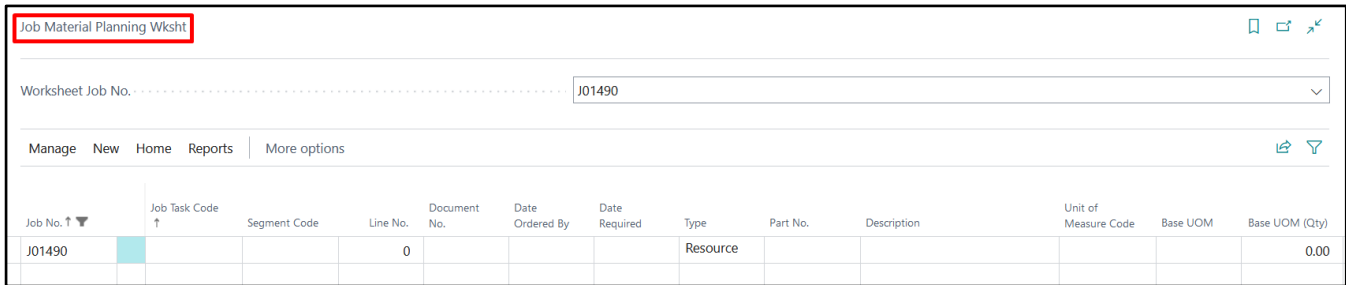
Job Planning Lines Job Task Lines Progress Billings Create Warehouse Pick Crews Links Job Segments

Next Job Material Planning Custom Reports Draws Job Task Line Worksheet APO Links Post Prepayment Invoice...

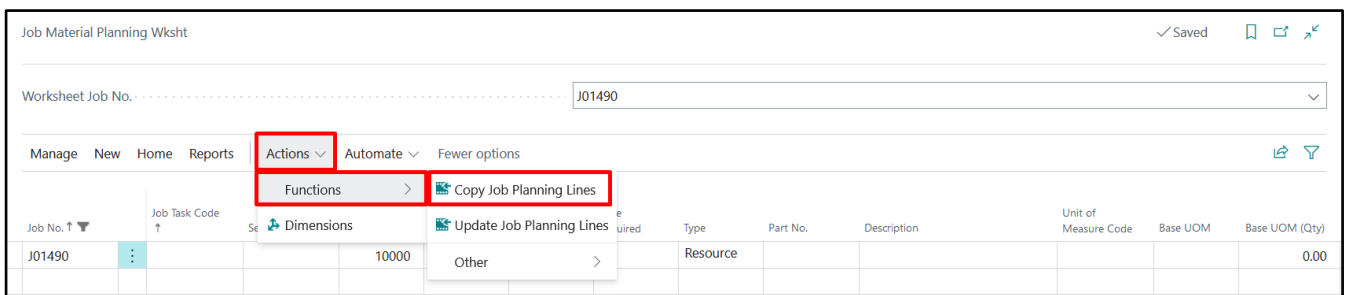
Previous Subcontracts Create Inventory Pick Job Forecast Worksheet Job Task Totals Job Contacts Post and Print Prepmnt. Invoice...

### Job Material Planning for ProjectPro Dynamics-BC

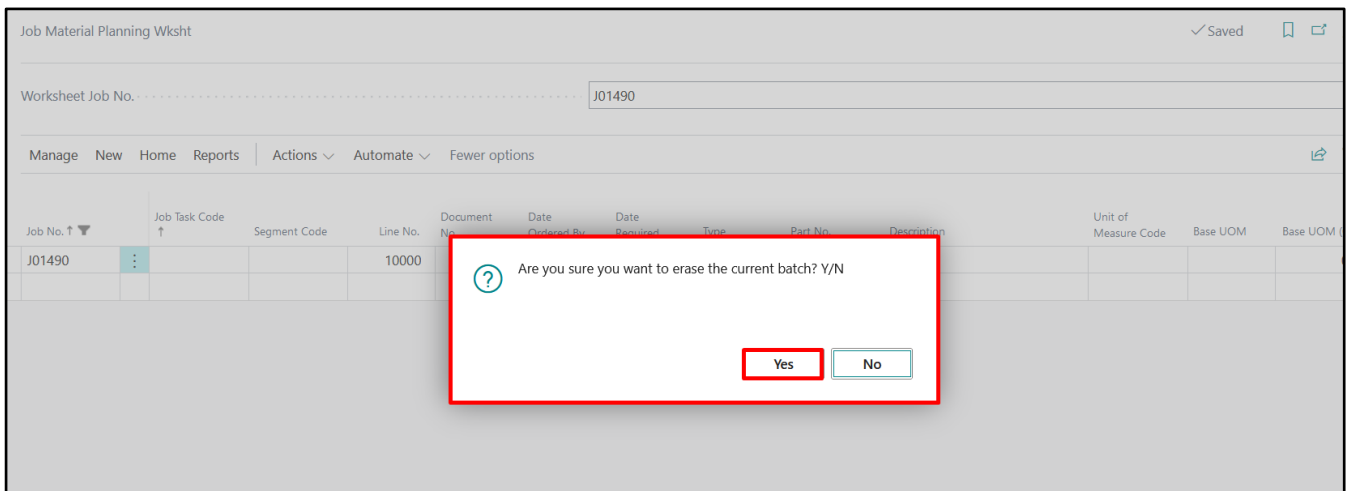
From this option the Job Material Planning (JMP) worksheet will open.



To populate planning lines from your job, select Actions→Functions→Copy Job Planning Lines.



After Clicking on the Copy Job planning Lines option, the system would ask for option, select Yes and all lines would be populated.



Notice at this time, your Resource and Item lines for Budget/Both Budget and Billable planning lines have been populated. If needed you can add additional items and resources during this step.

For each line, enter the appropriate “Document No.”, “Date Ordered By” and “Vendor”. These are mandatory fields.

### Job Material Planning for ProjectPro Dynamics-BC

Job Material Planning Wksht ✓ Saved

Worksheet Job No. J01490

Manage New Home Reports Actions Automate Fewer options

Job No.	Job Task Code	Seg... Code	Line No.	Document No.	Date Ordered By	Date Required	Type	Part No.	Description	Unit of Measure Code	Base UOM	Base UOM (Qty)	Vendor
J01490	01-32-43		10000	C1001	10/13/2023	10/13/2023	Resource	\$VJS\$PROJM...	Project Manager	HR		0.00	10004
J01490	01-32-43		20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	HR		0.00	10004
J01490	01-32-43		30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	EA	EA	100.00	10004
J01490	01-32-43		40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	EA	EA	120.00	10004
J01490	01-32-43		50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	CYD	CYD	140.00	10004

Note: If you have a vendor defined on the Item or Resource card, you will notice they are automatically populated for you in the Vendor field. If there are any changes to the vendor being used, please adjust them in this step.

Note: If you want to include any new changes in the Job Material Planning Worksheet, use “Update Job Planning Lines” option as below

Job Material Planning Wksht ✓ Saved

Worksheet Job No. J01490

Manage New Home Reports Actions Automate Fewer options

Functions > Copy Job Planning Lines

Update Job Planning Lines

Job No.	Job Task Code	Seg... Code	Line No.	Document No.	Date Ordered By	Date Required	Type	Part No.	Description	Unit of Measure Code	Base UOM	Base UOM (Qty)	Vendor
J01490	01-32-43		10000	C1001	10/13/2023	10/13/2023	Resource	\$VJS\$PROJM...	Project Manager	HR		0.00	10004
J01490	01-32-43		20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	HR		0.00	10004
J01490	01-32-43		30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	EA	EA	100.00	10004
J01490	01-32-43		40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	EA	EA	120.00	10004
J01490	01-32-43		50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	CYD	CYD	140.00	10004

Once you have completed all required fields on the worksheet. You can procure either Items, Resources, or both by selecting the Process tab from the ribbon.

Job Material Planning Wksht ✓ Saved

Worksheet Job No. J01490

Manage New Home Reports Actions Automate Fewer options

Get Actual Job Material Requisition Worksheet Purchase Resources Requisition Worksheet by Doc No.

Job No.	Job Task Code	Code	Line No.	No.	Ordered By	Required	Type	Part No.	Description	Measure Code	Base UOM	Base UOM (Qty)	Vendor
J01490	01-32-43		10000	C1001	10/13/2023	10/13/2023	Resource	\$VJS\$PROJM...	Project Manager	HR		0.00	10004
J01490	01-32-43		20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	HR		0.00	10004
J01490	01-32-43		30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	EA	EA	100.00	10004
J01490	01-32-43		40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	EA	EA	120.00	10004
J01490	01-32-43		50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	CYD	CYD	140.00	10004

- Go to Home → Requisition Worksheet/Requisition Worksheet by Doc No. → Select this option for procuring Items.
  - Requisition Worksheet** – This option is used for selecting all items, regardless of Document No. and date mentioned on the JMP Worksheet i.e., this option would bring in all the lines at the

## Job Material Planning for ProjectPro Dynamics-BC

Requisition worksheet of type Item.

- Requisition Worksheet by Doc No. – This option is used when you have multiple document numbers on the JMP worksheet, and you would like to process each document number separately.

2) Go to Home → Purchase Resources → Select the option for the procurement of Resources.

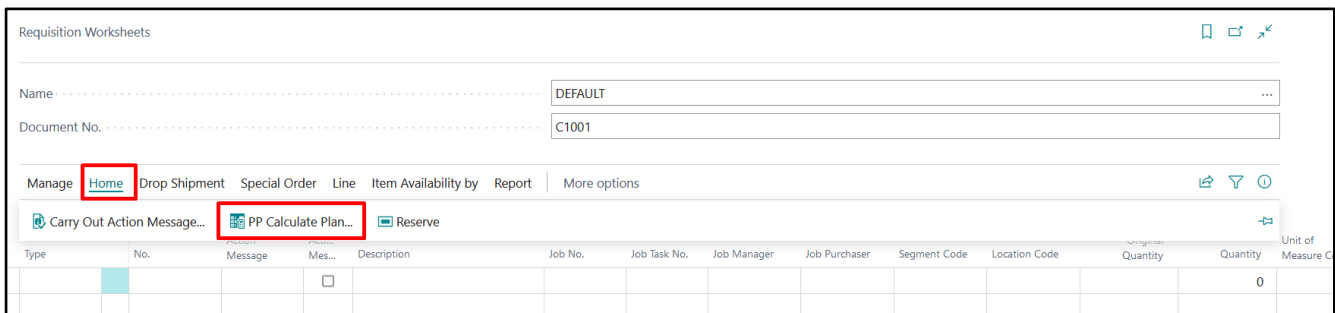
- *Note:* Resources must be marked as “purchasable” on the resource card, otherwise they will be excluded from the JMP process.

Now depending on the job, you may need to follow both options outlined above. Please follow the steps for each option separately.

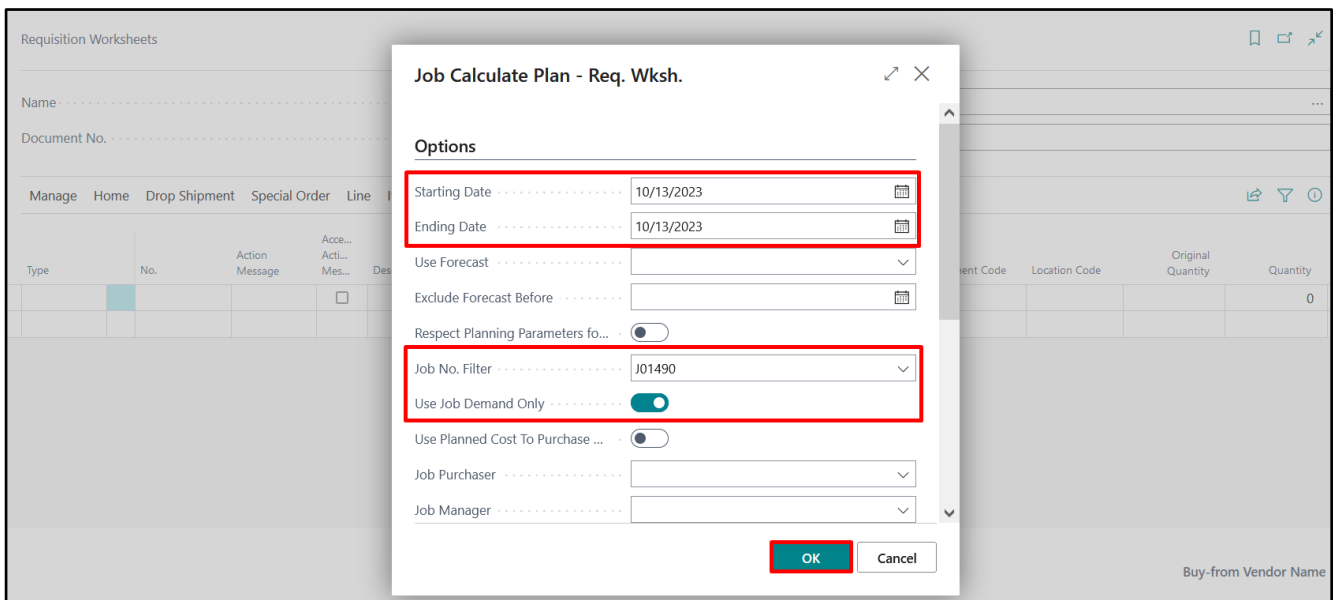
### 2. Releasing Purchase of Items through Job Purchase Orders

Go to Process → Requisition Worksheet: On Requisition Worksheet → Process → PP Calculate Plan.

Note: The only difference you will see between the Requisition Worksheet and Requisition Worksheet by Doc No. Is the Document No. Field filled in below the Name along with only the lines related to the Doc No. The process for procurement will be the same for either option.



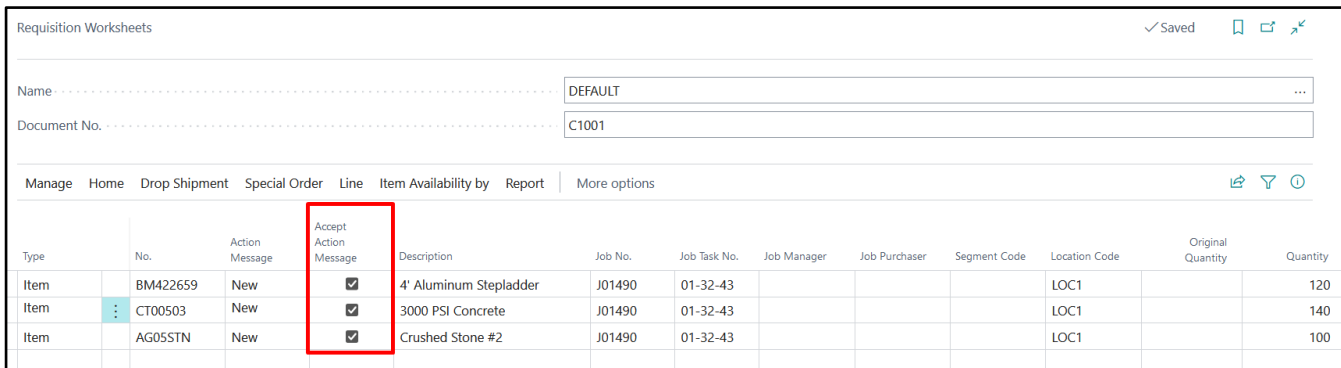
Fill in the options below:



### Job Material Planning for ProjectPro Dynamics-BC

FIELDS	DESCRIPTION
<b>Starting Date:</b>	Starting date for calculating plan corresponding to the “Date Ordered By” field on JMP worksheet
<b>Ending Date:</b>	Ending date for calculating plan corresponding to the “Date Ordered By” field on JMP worksheet
<b>Use Forecast:</b>	Specifies a forecast that should be included as demand when running the planning batch job. → <u>Not used in ProjectPro</u>
<b>Exclude Forecast Before:</b>	Specifies how much of the selected forecast to include, by entering a date before which forecast demand is not included. → <u>Not used in ProjectPro</u>
<b>Respect Planning Parameters:</b>	Specifies that planning lines triggered by safety stock will respect the following planning parameters: Reorder Point, Reorder Quantity, Reorder Point, and Maximum Inventory in addition to all order modifiers. If you do not select this check box, planning lines triggered by safety stock will only cover the exact demand quantity. → <u>Not used in ProjectPro</u>
<b>Job No. Filter:</b>	Filter the worksheet by Job No. to show only selected job’s lines.
<b>Use Job Demand Only:</b>	Set this as True, to get job demand for only the selected job.

When you click on OK your requisition worksheet will display line items that fit the criteria entered.



Type	No.	Action Message	Accept Action Message	Description	Job No.	Job Task No.	Job Manager	Job Purchaser	Segment Code	Location Code	Original Quantity	Quantity
Item	BM422659	New	<input checked="" type="checkbox"/>	4' Aluminum Stepladder	J01490	01-32-43				LOC1		120
Item	CT00503	New	<input checked="" type="checkbox"/>	3000 PSI Concrete	J01490	01-32-43				LOC1		140
Item	AG055TN	New	<input checked="" type="checkbox"/>	Crushed Stone #2	J01490	01-32-43				LOC1		100

You will notice that “Accept Action Message” is automatically selected for all lines brought into the worksheet. This indicates that a Purchase Order will be created for each item. If you would prefer not to include a specific item in the Purchase Order creation process at this time, uncheck the box.

The “Action Message” indicating “New”, means it is creating a new Purchase Order since inventory is not available.

To create your Purchase Orders, click the “Home” option on the ribbon and select “Carry Out Action Message”.

### Job Material Planning for ProjectPro Dynamics-BC

Requisition Worksheets ✓ Saved

Name: ..... DEFAULT

Document No.: ..... C1001

Manage **Home** Drop Shipment Special Order Line Item Availability by Report More options

**Carry Out Action Message...** PP Calculate Plan... Reserve

Type	No.	Message	Message	Description	Job No.	Job Task No.	Job Manager	Job Purchaser	Segment Code	Location Code	Quantity	Quantity
Item	BM422659	New	<input checked="" type="checkbox"/>	4' Aluminum Stepladder	J01490	01-32-43				LOC1		120
Item	CT00503	New	<input checked="" type="checkbox"/>	3000 PSI Concrete	J01490	01-32-43				LOC1		140
Item	AG05STN	New	<input checked="" type="checkbox"/>	Crushed Stone #2	J01490	01-32-43				LOC1		100

You will be prompted to select how you would like your Purchase Orders to be generated.

Requisition Worksheets ✓ Saved

Name: ..... DEFAULT

Document No.: ..... C1001

Manage Home Drop Shipment Special Order Line

**Job Carry Out Action Msg. - Req.**

Options

Print Orders

**PO by Job**

**OK** Cancel

Type	No.	Action Message	Accept Action Message
Item	BM422659	New	<input checked="" type="checkbox"/>
Item	CT00503	New	<input checked="" type="checkbox"/>
Item	AG05STN	New	<input checked="" type="checkbox"/>

FIELDS	DESCRIPTION
<b>Print Orders</b>	Toggle this "on" if you want to print or email your Purchase Orders
<b>Print by Job</b>	Toggle this "on" if you want to create a new Purchase Order for each Job. If you run the requisition worksheet wide open, without specifying a job, then you can check this option to avoid creating a blanket Purchase Order by Vendor.

Click on OK and your Purchase Orders will be generated.

Close out the Requisition Worksheet and review the Job Material Planning Worksheet. You can see that the Purchase Order was created and can drill down from this page to view the document.

Click on the PO Qty for the line you wish to view the Purchase Order for.

### Job Material Planning for ProjectPro Dynamics-BC

Job Material Planning Wksht ✓ Saved

Worksheet Job No. J01490

Manage New Home Reports Actions Automate Fewer options

Job No. ↑	Job Task Code ↑	Seg... Code	Line No.	Document No.	Date Ordered By	Date Required	Type	Part No.	Description	Inventory Qty. Staged	PO Qty	PO Qty Rcd
J01490	01-32-43		10000	C1001	10/13/2023	10/13/2023	Resource	\$VIS\$PROJIM...	Project Manager	0.00	0.00	0.00
J01490	01-32-43		20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	0.00	0.00	0.00
J01490	01-32-43		30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	0.00	100.00	0.00
J01490	01-32-43		40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	0.00	120.00	0.00
J01490	01-32-43		50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	0.00	140.00	0.00

For our example we will select the third line for PO Qty of 600. Below you will see the screen that pops up.

Purchase Lines ✕

Search Show Document Item Tracking Lines Reservation Entries More options

Document Type ↑	Document No. ↑	Buy-from Vendor No.	Type	No. ▼	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Description	Location Code	Quantity	Reserved Qty. (Base)	Unit of Measure Code
Order	PQ-50191	.10004	Item	AG05STN	LUMB	LABOR	Crushed Stone.#2	LOC1	100	0	EA

Click On “Show document” to open the PO.

### 3. Staging when Items are received or to be delivered to Jobs & Archived.

When the item is ready to be received, you can access the Purchase Order through the JMP Worksheet (shown in the above step) or use your Purchase Orders list page to search for the PO No.

Follow your business process for receiving items.

If you would like to “Stage” your items to be shipped to the job site, click the box “Staged” on the PO lines before receiving it in.

Purchase Order ✎ ✕ + 🗑 ✓ Saved

PO-50191 · Porter's Concrete

Home Prepare Print/Send Request Approval Order More options

Vendor Invoice No. P0192 Subcontract No.

Vendor Shipment No.  Draw No.

Job Purchaser  Gen. Bus. Posting Group LUMB

Job Manager  Status Open

Lines Manage Line Functions Order ✎ ✕

Type	No.	Description	Job No.	Job Task No.	Job Line Type	Gen. Bus. Posting Group	Staged	Gen. Prod. Posting Group	Job Cost Category	Quantity	Unit of Measure Code	Work Units	Work Unit of Meas...	Dep... Book Code
Item	BM422659	4' Aluminum Stepladder	J01490	01-32-43		LUMB	<input checked="" type="checkbox"/>	MATERIAL		120	EA	0.00		
Item	CT00503	3000 PSI Concrete	J01490	01-32-43		LUMB	<input checked="" type="checkbox"/>	MATERIAL	MAT	140	CYD	0.00		
Item	AG05STN	Crushed Stone #2	J01490	01-32-43		LUMB	<input checked="" type="checkbox"/>	LABOR	MAT	100	EA	0.00		

### Job Material Planning for ProjectPro Dynamics-BC

To Post, select the “Home” option from the ribbon and select the appropriate option for your business process.

Purchase Order ✓ Saved

PO-50191 · Porter's Concrete

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document Progress Payments

Job Purchaser: [Dropdown] Gen. Bus. Posting Group: LUMB

Job Manager: [Dropdown] Status: Open

Purchase Order ✓ Saved

PO-50191 · Porter's Concrete

Home Prepare Print/Send Request Approval Order More options

Vendor Invoice No.: P0192 Subcontract No.: [Dropdown]

Vendor Shipment No.: [Dropdown] Draw No.: [Dropdown]

Job Purchaser: [Dropdown] Gen. Bus. Posting Group: LUMB

Job Manager: [Dropdown] Status: Open

Receive

Invoice

Receive and Invoice

OK Cancel

Type	No.	Description	Job No.	Job No.	Date	Date	Type	Part No.	Description	Job Cost Category	Quantity	Unit of Measure Code	Work Units	Work Unit of Meas...	Dep... Book Code
Item	BM422659	4' Aluminum Stepladder	J01490	01-32-43	LUMB	10/13/2023	10/13/2023	MATERIAL			120	EA	0.00		
Item	CT00503	3000 PSI Concrete	J01490	01-32-43	LUMB	10/13/2023	10/13/2023	MATERIAL	MAT		140	CYD	0.00		
Item	AG05STN	Crushed Stone #2	J01490	01-32-43	LUMB	10/13/2023	10/13/2023	LABOR	MAT		100	EA	0.00		

On the Job Material Planning Work Sheet, you will see that received items have now been moved from PO Qty to PO Qty Received & PO Qty Staged.

If your business process is to receive and invoice a PO in the same step, you will see PO Qty. Invoiced will also be populated. See line 4 of the example above where we have received and invoiced a quantity of 100 in the same.

When you revisit the JMP Worksheet, you will see that PO Qty Received of 150 is now displayed in the “PO Qty Staged” column.

Job Material Planning Wkshet ✓ Saved

Worksheet Job No.: J01490

Manage New Home Reports Actions Automate Fewer options

Job No.	Job Task Code	Seg... Code	Line No.	Document No.	Date Ordered By	Date Required	Type	Part No.	Description	PO Qty Rcd	PO Qty Staged	PO Qty. Invoiced
J01490	01-32-43		10000	C1001	10/13/2023	10/13/2023	Resource	\$VJ\$PROJIM...	Project Manager	0.00	0.00	0.00
J01490	01-32-43		20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	0.00	0.00	0.00
J01490	01-32-43		30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	100.00	100.00	0.00
J01490	01-32-43		40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	120.00	120.00	0.00
J01490	01-32-43		50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	140.00	140.00	0.00

## Job Material Planning for ProjectPro Dynamics-BC

### 4. Job Material Planning Reports (Include Delivery Ticket)

When the items are ready to be shipped to the job site, print a delivery ticket if required.

To print, select Reports from the ribbon and select Delivery Ticket.

Job Material Planning Wksht

Worksheet Job No. J01490

Manage New Home **Reports** Actions Automate Fewer options

Print Job Material Worksheet **Delivery Ticket**

Job No.	Code	Line No.	No.	Ordered By	Required	Type	Part No.	Description	Measure Code	Base UOM	Base UOM (Qty)	Vendor
J01490	01-32-43	10000	C1001	10/13/2023	10/13/2023	Resource	\$VIS\$PROIM...	Project Manager	HR		0.00	10004
J01490	01-32-43	20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	HR		0.00	10004
J01490	01-32-43	30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	EA	EA	100.00	10004
J01490	01-32-43	40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	EA	EA	120.00	10004
J01490	01-32-43	50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	CYD	CYD	140.00	10004

A JMP Delivery Ticket Worksheet will pop up.

Mention the Quantity in "PO Ship Qty" field & then Click on "Update Qty" and then "Print Job Delivery Ticket"

Edit - JMP Delivery Ticket Wksht

Worksheet Job No. J01490

Print Job Delivery Ticket... Update Qty...

Type	Part No.	Description	Total Qty. Avail. to Ship	Available from Staged Inventory	Inventory Ship Qty	Available From Staged PO's	PO Ship Qty.	Total Qty. to Ship	Box ID	Job Site Vndr Qty	Job Site From Inv.
Item	AG05STN	Crushed Stone #2	100.00	0.00	0.00	100.00	100.00	100.00		0.00	0
Item	BM422659	4' Aluminum Stepladder	120.00	0.00	0.00	120.00	120.00	120.00		0.00	0
Item	CT00503	3000 PSI Concrete	140.00	0.00	0.00	140.00	140.00	140.00		0.00	0

When prompted select if you would like to Post and select Print.

Delivery Ticket JMP

Printer: (Handled by the browser)

Report Layout: ./Layouts/NSDelivery Ticket JMP.rdl

Post?

Filter: Job Material Planning


Worksheet Job No. J01490

Advanced >

Send to... **Print** Preview & Close Cancel

**Job Material Planning for ProjectPro Dynamics-BC**

Below is the screen shot of the “Job Delivery Ticket” having “Quantity Shipped” & other details.



**Job Delivery Ticket**  
10/20/2023 11:56:23 AM  
1 of 1

To: Haynes Contracting Corp.  
1870 Forbes Ave.  
Pittsburgh

Customer Account Name Chris Haynes  
Job No. J01490  
Job Name Building Construction  
Project Engineer

Please review the order. Any discrepancies must be reported within 24 hours of delivery

**Delivery Instruction:-**

Quantity Shipped	Box Ref	Part No	Description
100		AG05STN	Crushed Stone #2
120		BM422659	4' Aluminum Stepladder
140		CT00503	3000 PSI Concrete

Now we have posted the Delivery Ticket so the “Delivery Ticket” will not be printed again using the same option. If the user wants to print the “Delivery Ticket” again then he needs to search “Delivery Ticket Archive” in search option and click on the result.

Tell me what you want to do ↗ ✕

JMP delivery

**Go to Pages and Tasks**

> JMP Delivery Ticket WkshtLists

**Go to Reports and Analysis**

 Delivery Ticket JMPReports and Analysis

“Delivery Ticket Archive” page will open and by selecting the line, user need to click on “Print Job Delivery Ticket” in order to print it again.

### Job Material Planning for ProjectPro Dynamics-BC

JMP Delivery Ticket Wksht ✓ Saved

Worksheet Job No. J01490

Print Job Delivery Ticket... Update Qty... More options

Type	Part No.	Description	Total Qty. Avail. to Ship	Available from Staged Inventory	Inventory Ship Qty	Available From Staged PO's	PO Ship Qty.	Total Qty. to Ship	Box ID	Job Site Vndr Qty
Item	AG05STN	Crushed Stone #2	100.00	0.00	0.00	100.00	100.00	100.00		0.00
Item	BM422659	4' Aluminum Stepladder	120.00	0.00	0.00	120.00	120.00	120.00		0.00
Item	CT00503	3000 PSI Concrete	140.00	0.00	0.00	140.00	140.00	140.00		0.00

Duplicate Copy of the "Job Delivery Ticket"

### Job Delivery Ticket

10/20/2023 12:02:02 PM

1 of 1

To: Haynes Contracting Corp.  
1870 Forbes Ave.  
Pittsburgh

Customer Account Name Chris Haynes  
Job No. J01490  
Job Name Building Construction  
Project Engineer

Please review the order. Any discrepancies must be reported within 24 hours of delivery

**Delivery Instruction:-**

Quantity Shipped	Box Ref	Part No	Description
100		AG05STN	Crushed Stone #2
120		BM422659	4' Aluminum Stepladder
140		CT00503	3000 PSI Concrete

### 5. Releasing Purchase of Resources through Resource Purchase Invoice

On the JMP Worksheet, go to Home → Purchase Resources

Job Material Planning Wksht ✓ Saved

Worksheet Job No. J01490

Manage New **Home** Reports Actions Automate Fewer options

Get Actual Job Material Requisition Worksheet **Purchase Resources** Requisition Worksheet by Doc No.

Job No.	Code	Line No.	No.	Ordered By	Required	Type	Part No.	Description	Measure Code	Base UOM	Base UOM (Qty)	Vendor
J01490	01-32-43	10000	C1001	10/13/2023	10/13/2023	Resource	\$VJSSPROJIM...	Project Manager	HR		0.00	10004
J01490	01-32-43	20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	HR		0.00	10004
J01490	01-32-43	30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	EA	EA	100.00	10004
J01490	01-32-43	40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	EA	EA	120.00	10004
J01490	01-32-43	50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	CYD	CYD	140.00	10004

### Job Material Planning for ProjectPro Dynamics-BC

Notice that we have 3 purchasable resources that have populated from our JMP Wksht in this example.

JMP Purch. Res. G/L ✓ Saved

Search Edit List Delete Purchase More options

Purchase Res. G/L	Order Code	Part No. ↑	Description	Vendor No. ▼	Quantity	Bal. Req ↑
<input checked="" type="checkbox"/>	01-32-43	\$VJ\$\$PROJMGR	Project Manager	10004	20.00	20.00
<input checked="" type="checkbox"/>	01-32-43	CABLING	Cabling Installer	10004	25.00	25.00

The Purchase Res. G/L option is automatically checked to indicate that we would like to create a Purchase Order for each line item. Uncheck if there are any items you would not like a Purchase Order created for at this time.

To create the Purchase Order, select "Purchase" from the ribbon:

JMP Purch. Res. G/L ✓ Saved

Search Edit List Delete **Purchase** More options

Purchase Res. G/L	Order Code	Part No. ↑	Description	Vendor No. ▼	Quantity	Bal. Req ↑
<input checked="" type="checkbox"/>	01-32-43	\$VJ\$\$PROJMGR	Project Manager	10004	20.00	20.00
<input checked="" type="checkbox"/>	01-32-43	CABLING	Cabling Installer	10004	25.00	25.00

Confirmation of the Purchase Order creation will pop up with an option to view the PO.

JMP Purch. Res. G/L ✓ Saved

Search Edit List Delete Purchase More options

Purchase Res. G/L	Order Code	Part No. ↑	Description	Vendor No. ▼	Quantity	Bal. Req ↑
<input checked="" type="checkbox"/>	01-32-43	\$VJ\$\$PROJMGR	Project Manager	10004	20.00	20.00
<input checked="" type="checkbox"/>	01-32-43	CABLING	Cabling Installer	10004	25.00	25.00

❓ "Purchase Invoice "PI-40052" created from Job Material Planning.  
Would you like to go there now?"

When you revisit the JMP Worksheet, you will see that your PO Qty is updated. In this example, Purchase Order is only created for one item.

Job Material Planning Wksht ✓ Saved

Worksheet Job No. J01490

Manage New Home Reports Actions Automate Fewer options

Job No. ↑	Job Task Code ↑	Seg... Code	Line No.	Document No.	Date Ordered By	Date Required	Type	Part No.	Description	Inventory Qty. Staged	PO Qty	PO Qty Red
J01490	01-32-43		10000	C1001	10/13/2023	10/13/2023	Resource	\$VJ\$\$PROJM...	Project Manager	0.00	20.00	0.00
J01490	01-32-43		20000	C1001	10/13/2023	10/13/2023	Resource	CABLING	Cabling Installer	0.00	25.00	0.00
J01490	01-32-43		30000	C1001	10/13/2023	10/13/2023	Item	AG05STN	Crushed Stone #2	0.00	0.00	100.00
J01490	01-32-43		40000	C1001	10/13/2023	10/13/2023	Item	BM422659	4' Aluminum Stepladder	0.00	0.00	120.00
J01490	01-32-43		50000	C1001	10/13/2023	10/13/2023	Item	CT00503	3000 PSI Concrete	0.00	0.00	140.00

### Job Material Planning for ProjectPro Dynamics-BC

Click on the PO Qty for the line you wish to view the Purchase Order for. Click on Show Document to open the PO.

Document Type ↑	Document No. ↑	Buy-from Vendor No.	Type	No. ▼	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Description	Location Code	Quantity	Reserved Qty. (Base)	Unit of Measure Code
Invoice	PI-40052	10004	Resource	\$VJS\$PROJM...	LUMB	LABOR	Project Manager		20	0	HR

Enter Vendor Invoice No. on the Purchase Invoice.

**Purchase Invoice** PI-40052 · Porter's Concrete

Home Prepare Request Approval Invoice More options

Post Release

Vendor Name: Porter's Concrete Job No.: J01490

Contact: Steve Porter Retention Document:

Posting Date: 10/20/2023 Subcontract No.:

Due Date: 10/20/2023 Draw No.:

**Vendor Invoice No.: P0193** Status: Open

Lines Manage Line

New Line Delete Line Select items...

Type	No.	Description/Comment	Job No.	Job Task No.	Segment Code	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Depreciation Book Code	Job Cost Category	Location Code
Resource	\$VJS\$PROJM...	Project Manager	J01490	01-32-43		LUMB	LABOR		LAB	
Resource	CABLING	Cabling Installer	J01490	01-32-43		LUMB	LABOR		LAB	

If your business process is to stage resources, select the staged option before receiving.

From the ribbon, select "Home" and then "Post".

**Purchase Invoice** PI-40052 · Porter's Concrete

Home Prepare Request Approval Invoice More options

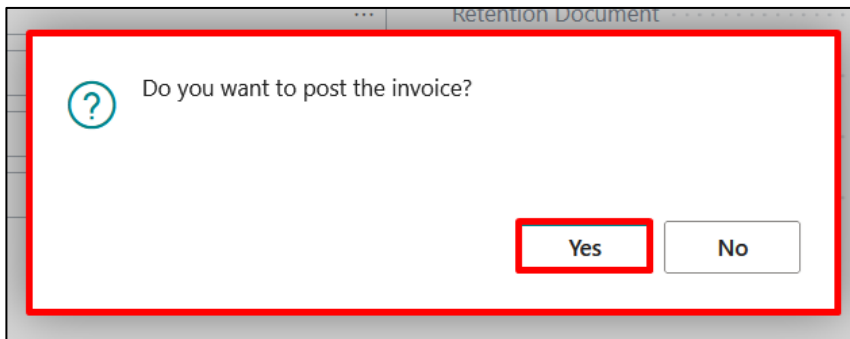
Post Release

Vendor Name: Porter's Concrete Job No.: J01490

Contact: Steve Porter Retention Document:

Select the appropriate option for your business process and select Yes.

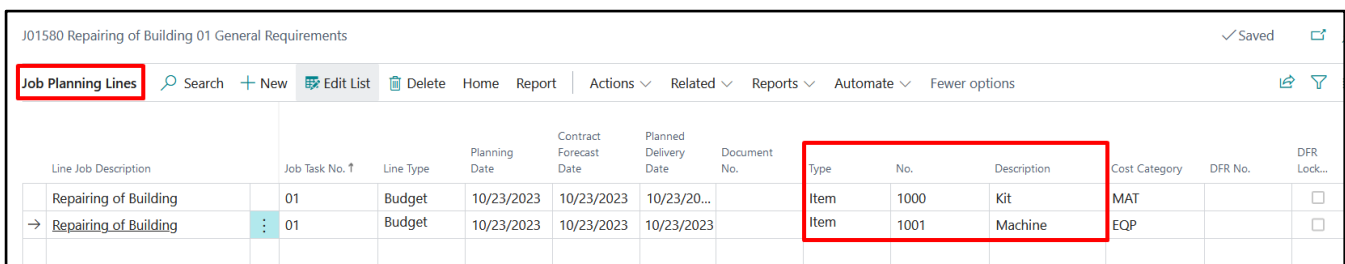
## Job Material Planning for ProjectPro Dynamics-BC



### 6. Assembly BOM feature inclusion on Job Material Planning (JMP)

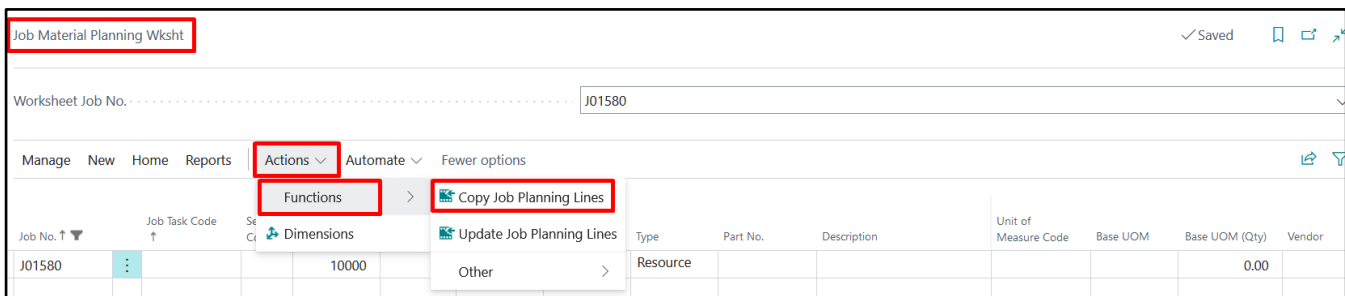
An assembly item is **an inventory item made up of several components but identified as a single item**. Assemblies are manufactured by combining raw materials that you stock.

On Job Planning lines user take the Item is an Assembly BOM item



Line Job Description	Job Task No. ↑	Line Type	Planning Date	Contract Forecast Date	Planned Delivery Date	Document No.	Type	No.	Description	Cost Category	DFR No.	DFR Lock...
Repairing of Building	01	Budget	10/23/2023	10/23/2023	10/23/20...		Item	1000	Kit	MAT		<input type="checkbox"/>
→ Repairing of Building	01	Budget	10/23/2023	10/23/2023	10/23/2023		Item	1001	Machine	EQP		<input type="checkbox"/>

On Job Material Planning Worksheet, to populate planning lines from your job, select Actions → Functions → Copy Job Planning Lines.



Job Material Planning Wksht

Worksheet Job No. J01580

Manage New Home Reports Actions Automate Fewer options

Functions Copy Job Planning Lines

Job No. ↑	Job Task Code ↑	Se Ci	Dimensions	Type	Part No.	Description	Unit of Measure Code	Base UOM	Base UOM (Qty)	Vendor
J01580			10000	Resource					0.00	

On the Job Material Planning Worksheet we can see that the Assembly BOM item has been copied and all the items under Assembly item are visible.

### Job Material Planning for ProjectPro Dynamics-BC

Job Material Planning Wksht ✓ Saved

Worksheet Job No.

Manage New Home Reports Actions Automate Fewer options

Job No. ↑	Job Task Code ↑	Seg... Code	Line No.	Document No.	Date Ordered By	Date Required	Type	Part No.	Description	Unit of Measure Code	Base UOM	Base UOM (Qty)	Vend...
J01580	01		10000			10/23/2023	Item	1000	Kit	BOX	BOX	50.00	
J01580	01		20000			10/23/2023	Item	BM193181	Drill Kit 8-18	EA	EA	100.00	
J01580	01		30000			10/23/2023	Item	BM225284	Lag Screw Driver-Adaptor	EA	EA	200.00	
J01580	01		40000			10/23/2023	Item	DB-42-100	Drill Bit 42"	EA	EA	50.00	
J01580	01		50000			10/23/2023	Item	1001	Machine	DAY	DAY	70.00	
J01580	01		60000			10/23/2023	Item	WD570206	6"White Straight Bracket	EA	EA	700.00	
J01580	01		70000			10/23/2023	Item	WD773051	White Ultra Finish Shutters	EA	EA	350.00	

And after this step User needs to follow the same process from the above process of Job Material Planning.

### 7. Copying Assembly BOM from Job to Job

To Copy Assembly BOM from Job-to-Job User needs to Copy the Job from the Job List page.

Jobs

Search + New Manage Home Job Prices & Discounts WIP Report Actions Related Reports Automate Fewer options

Functions Copy Job... Calculate Margin

No. ↑	Description	Job Class	Sub-Level to Job No.	Budg	Schedule of Values	Calculate Margin	Price (\$)	Actual Invoiced Less Actual Cost (Margin)	Bill-to Customer No.	Billable/Invoiced Difference	Status
J01580	Repairing of Building	Master Job					0.00	0.00	10004	0.00	Open
J1-001		Master Job					0.00	0.00		0.00	Open
PR2001	T&M Earthwork	Master Job		2,000.00	3,375.00	0.00	0.00	0.00	10003	0.00	Open
PR2002	Apt 106A	Master Job		1,370.00	28,000.00	0.00	0.00	0.00	10004	0.00	Open
PR2003	Inventory Quote for Items	Master Job		13,258.25	13,665.00	0.00	0.00	0.00	10003	0.00	Open
PR2004	Generator for UCLA	Master Job		501,485.26	821,660.00	0.00	0.00	0.00	UCLA	-821,660.00	Open

Now the user needs to select the mandatory fields and fill the required information in it.

Copy Job Ext.

Copy from

Job No.  Ind. Planning Line Type

Job Task No. from  Ind. Ledger Entry Line Type

Job Task No. to  Starting Date

Source  Ending Date

Copy to

Job No.  Sell-To Customer No.

Job Description  Bill-To Customer No.

Apply

Copy Job Prices

Copy Quantity

Copy Dimensions

OK Cancel

### Job Material Planning for ProjectPro Dynamics-BC

After clicking on OK a new Job has been created and planning lines have been copied to the new Job.

Copy Job Ext. ✕

Copy from

Job No. J01580 Ind. Planning Line Type Budget+Billable

Job Task No. from 01 Ind. Ledger Entry Line Type Usage+Sale

Job Task No. to Starting Date 10/23/2023

Source Job Planning Lines Ending Date 10/23/2023

Copy to

Job No. 10004

Job Description Repairing of Building 10004

Job No. J01590 will be assigned to the new Job. Do you want to continue?

Apply

Copy Job Prices

Copy Dimensions

We can see that on the new Job all the Planning lines have been copied.

J01590 Repairing of Building 01 General Requirements ✓ Saved

**Job Planning Lines** Search + New Edit List Delete Home Report Actions Related Reports Automate Fewer options

Line Job Description	Job Task No. ↑	Line Type	Planning Date	Contract Forecast Date	Planned Delivery Date	Document No.	Type	No.	Description	Cost Category	DFR No.
→ Repairing of Building	01	Budget	10/23/2023	10/23/2023	10/23/20...		Item	1000	Kit	MAT	
Repairing of Building	01	Budget	10/23/2023	10/23/2023	10/23/20...		Item	1001	Machine	EQP	

On Job Material Planning Line Worksheet after running the Copy Planning lines functionality we can see that all the Assembly BOM lines are copied.

Job Material Planning Wksht ✓ Saved

Worksheet Job No. J01590

Manage New Home Reports Actions Automate Fewer options

Job No. ↑	Job Task Code ↑	Seg... Code	Line No.	Document No.	Date Ordered By	Date Required	Type	Part No.	Description	Unit of Measure Code	Base UOM	Base UOM (Qty)
J01590	01		10000			10/23/2023	Item	1000	Kit	BOX	BOX	50.00
J01590	01		20000			10/23/2023	Item	BM193181	Drill Kit 8-18	EA	EA	100.00
J01590	01		30000			10/23/2023	Item	BM225284	Lag Screw Driver-Adaptor	EA	EA	200.00
J01590	01		40000			10/23/2023	Item	DB-42-100	Drill Bit 42"	EA	EA	50.00
J01590	01		50000			10/23/2023	Item	1001	Machine	DAY	DAY	70.00
J01590	01		60000			10/23/2023	Item	WD570206	6"White Straight Bracket	EA	EA	700.00
J01590	01		70000			10/23/2023	Item	WD773051	White Ultra Finish Shutters	EA	EA	350.00