



StoryPoint


Manual

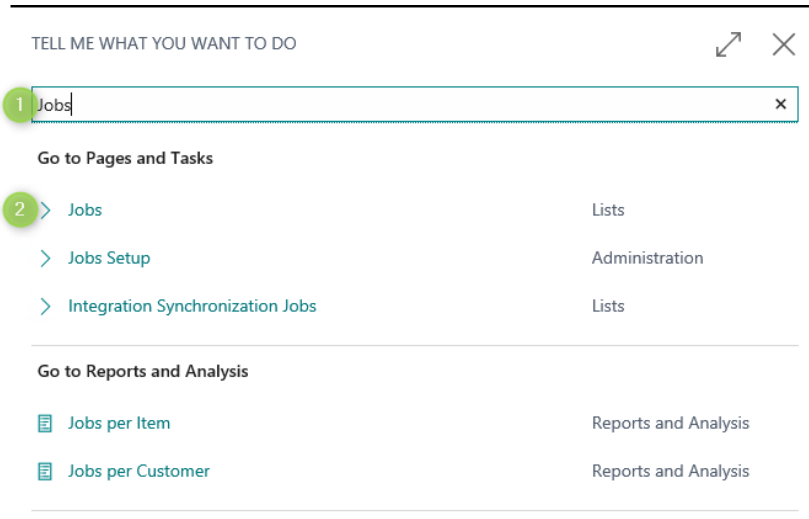
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Update Invoice Details on a Job

1. Search for Job

- a. Press ALT+Q or 
- b. Type Jobs in search field (1) and select it (2)



TELL ME WHAT YOU WANT TO DO

1 Jobs

Go to Pages and Tasks

2 > Jobs Lists

> Jobs Setup Administration

> Integration Synchronization Jobs Lists

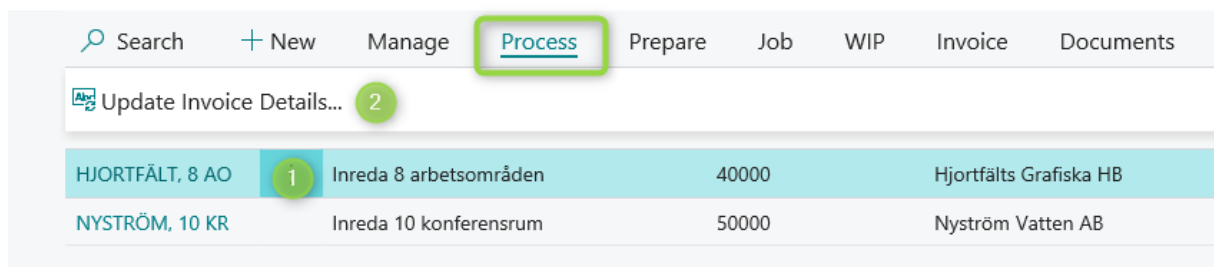
Go to Reports and Analysis

Jobs per Item Reports and Analysis

Jobs per Customer Reports and Analysis

2. Select the Job you want to update the invoicing details for (1). Go to menu item Update Invoice Details (2) under Process.
3. By pressing Update Invoice Details (2), the customer information on the Job is updated with the actual information on the Customer.


Jobs



Search	+ New	Manage	Process	Prepare	Job	WIP	Invoice	Documents
Update Invoice Details... 2								
HJORTFÄLT, 8 AO	1 Inreda 8 arbetsområden	40000	Hjortfält's Grafiska HB					
NYSTRÖM, 10 KR	Inreda 10 konferensrum	50000	Nyström Vatten AB					

Batch Update Resource Capacity

1. Search for Batch Update Resource Capacity

- a. Press ALT+Q or 
- b. Type batch update resource capacity search field (1) and select it

TELL ME WHAT YOU WANT TO DO



1 batch update resource capacity



Go to Pages and Tasks

2 > Batch Update Resource Capacity

Tasks

2. Enter filters

- Enter a date filter (1).
- Select a Work-Hour Template (2) and/or type in the hours (3).
- Choose to filter on resource (4) if you do not want to create/update capacity entries for all resources.
- When done, press OK (5).

EDIT - BATCH UPDATE RESOURCE CAPACITY

Date Filter

1 19-01-01..19-12-31

Work-Hour Template

2

Base Calendar Code

Monday

3

8,00

Tuesday

8,00

Wednesday

8,00

Thursday

8,00

Friday

8,00

Saturday

0,00

Sunday

0,00

Week Total

40

Resource

Show results:

4 Where:

No.

is:

And:

Resource Group No.

is:

And:

Resource Category Code

is:


Schedule...

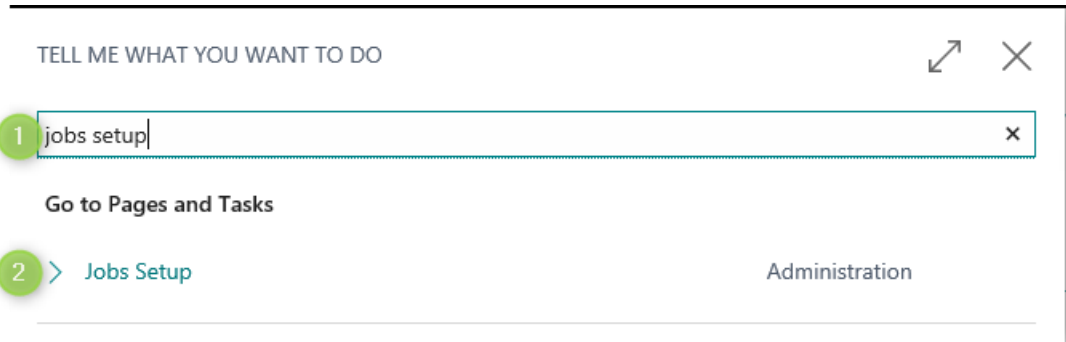
OK 5

Cancel

Get Invoice Details From Bill-To Customer for Job Invoices

1. Search for Jobs Setup

- Press ALT+Q or 
- Type jobs setup (1) and select it (2)



TELL ME WHAT YOU WANT TO DO

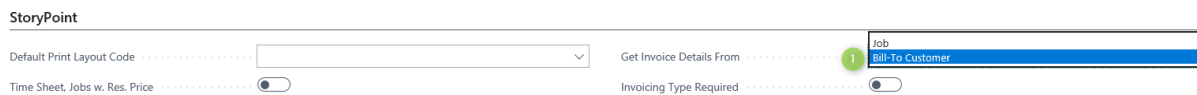
1 jobs setup

Go to Pages and Tasks

2 > Jobs Setup Administration

2. Expand Fast Tab StoryPoint

3. Select Bill-To Customer (1) in field Get Invoice Details from



StoryPoint

Default Print Layout Code

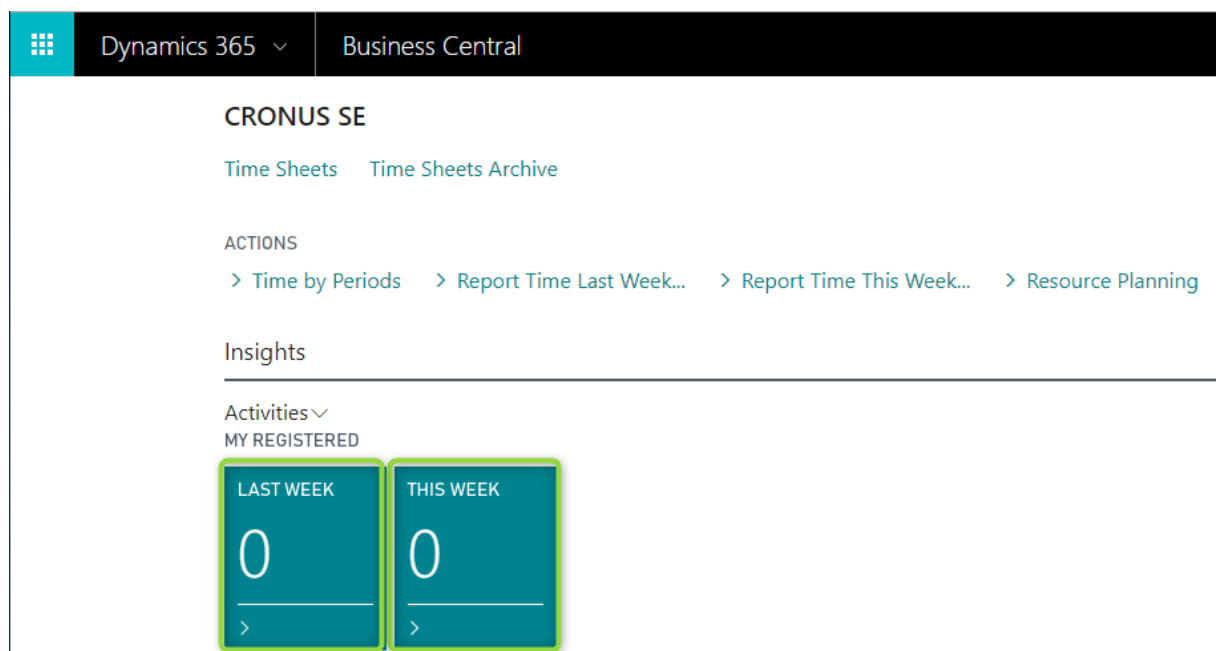
Time Sheet, Jobs w. Res. Price

Get Invoice Details From 1 Job Bill-To Customer

Invoicing Type Required

Report Time (not phone)

Click on LAST WEEK or THIS WEEK on your start page (when using StoryPoint Role Center “Tidrapportör”).



Dynamics 365 Business Central

CRONUS SE

Time Sheets Time Sheets Archive

ACTIONS

> Time by Periods > Report Time Last Week... > Report Time This Week... > Resource Planning

Insights

Activities MY REGISTERED

LAST WEEK 0

THIS WEEK 0

[illegible]

Search

+ New

Edit List

Delete

Process

Open in Excel

Actions

Less options

RESOURCE TIME SHEET LINES - R0010

+ New

TYPE	JOB NO.	JOB TASK NO.	JOB DESCRIPTION	CAUSE OF ABSENCE CODE	DESCRIPTION	COMMENT
Job	P00020	100	Alpine Ski House Certificate Job		Design	
Absence				VAC	Vacation	

OK

Cancel

Manage
[Process](#)
Navigate
Lines

Actions
Navigate
Less options

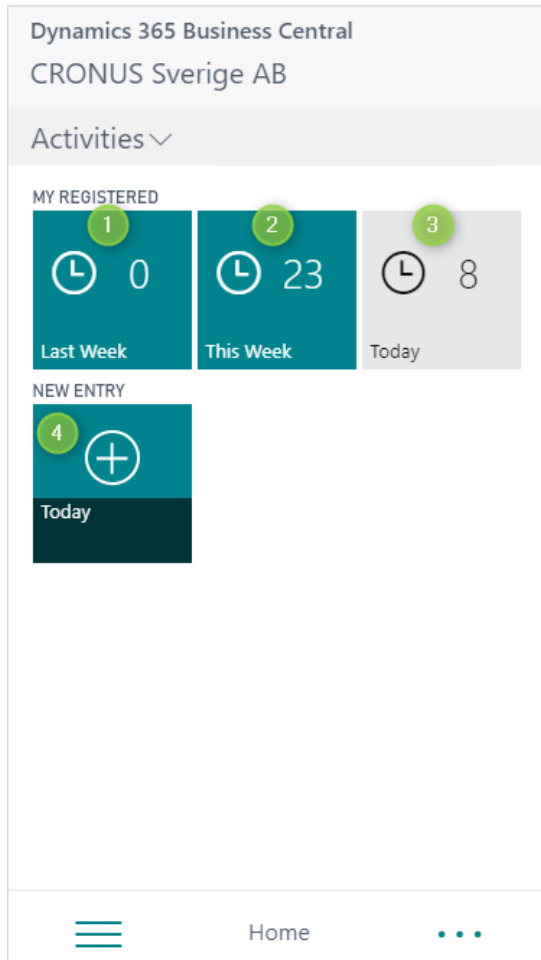
Submit 2
Reopen

TYPE	DESCRIPTION	2 MON	3 TUE	4 WED	5 THU	6 FRI	CAUSE OF ABSENCE CODE	STATUS
Job	Design	1 8	8	8	8	8		Submitted 3









Use Phone to Report Time

Log on to Business Central from a mobile phone using the StoryPoint Rollcenter “Tidrapportör”.

1. Select Last week (1) to register time for previous week, This Week (2) to register for current week or Today (4) to register time for current day. Today (3) shows as summary of registered hours for current day.



2. When selecting This Week. A list of all days in current weeks are listed.
To report time, swipe from right to left on the day you want to enter time for. When Swiping (1) New Activity appears at the right, let go of the swipe to select an activity to register time on. It is also possible to reach New Activity at the bottom of the page (2).

CRONUS Sverige AB		
Period 21-03-01 - 21-03-07		
	2021-03-01 Monday w 9	8,00/8,00
	2021-03-02 Tuesday w 9	8,00/8,00
	2021-03-03 Wednesday w 9	7,00/8,00
2021-03-04 Thursday w 9	 0,00/8,00	New Activity
	2021-03-05 Friday w 9	0,00/8,00
	2021-03-06 Saturday w 9	0,00/0,00
  		



= Time has not been submitted



= You have registered and submitted according to your capacity









= You have registered and submitted below your capacity



= Your manager has rejected time

- When selecting New Activity, a list of your favorites is shown. Choose a line by tapping on it (1)

(Favorites)		
		
Hjortfältts Grafiska AB HJORTFÄLT, 8 AO, 1120 Val av inredning		Job
Hjortfältts Grafiska AB HJORTFÄLT, 8 AO, 1210 Montering av möbler o.s.v.		Job
Nyström Vatten AB NYSTRÖM, 10 KR, 1120 Val av inredning		Job

4. To see all available activities tap on the three dots (1) at the end of the page.






(Favorites)		
		
Hjortfältts Grafiska AB HJORTFÄLT, 8 AO, 1120 Val av inredning		Job
Hjortfältts Grafiska AB HJORTFÄLT, 8 AO, 1210 Montering av möbler o.s.v.		Job
Nyström Vatten AB NYSTRÖM, 10 KR, 1120 Val av inredning		Job






Select All, to see all available activities to register time on, jobs and absence.



(Favorites)

Process

-  Absence
-  All 1
-  Favorites
-  History
-  Planned


Page

-  Refresh
Update the page with any changes made by other users.
-  Open in Excel
Opens an Excel file with the data exported from the list (selected filters and columns).

- After you have chosen which activity to register time on, type in how many hours (1) you've spent on that activity and save (2)

New: 21-03-04





Activity
HJORTFÄLT, 8 AO, 1120 

Customer
Hjortfält's Grafiska AB

Description
Val av inredning

Quantity
 1

Chargeable
☐

 2   

- Select the three dots (1) at the end of the page and select Submit period to send all registered time to your manager to approve.

CRONUS Sverige AB

Period 21-03-01 - 21-03-07

✓	2021-03-01 Monday w 9	8,00/8,00
✓	2021-03-02 Tuesday w 9	8,00/8,00
!	2021-03-03 Wednesday w 9	7,00/8,00
✎	2021-03-04 Thursday w 9	2,00/8,00
✎	2021-03-05 Friday w 9	0,00/8,00
	2021-03-06 Saturday w 9	0,00/0,00

←
🔍
1

CRONUS Sverige AB

Period 21-03-01 - 21-03-07

Process

Submit period

2

Reopen period

Page

Refresh

Update the page with any changes made by other users.

Open in Excel

Opens an Excel file with the data exported from the list (selected filters and columns).

Help

Dynamics 365 Business Central Help

Get help using Dynamics 365 Business Central.

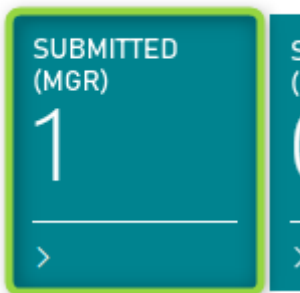
←
⋮

Approve Time

Click on SUBMITTED (MGR) your start page (when using StoryPoint Role Center “Projektledare”).

Activities ▾




TIME SHEET MANAGER



Select and click on (1) time sheet you want to open and approve.

Manager Time Sheet: Submitted (Mgr) ▾													
<div> <div>🔍 Search</div> <div>✕ Delete</div> <div>Process ▾</div> <div>📄 Open in Excel</div> </div>				<div> <div>Actions ▾</div> <div>Navigate ▾</div> <div>Less options</div> </div>									
NO.	STARTING DATE	ENDING DATE	RESOURCE NO.	RESOURCE NAME	OPEN EXISTS	OPEN W/ QUAN... EXISTS	SUBM... EXISTS	REJE... EXISTS	APPR... EXISTS	POST... EXISTS	COMM...	CAPACITY	QUANTITY
TS00010	2018-04-02	2018-04-08	R0010	John Doe	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	40	40

Click on Approve (1) after reviewing the submitted line. If there is more than one submitted line, you can choose if you want to approve one or all lines. When a line is approved the status will be changed to Approved (3).

<div> Process Navigate Show </div> <div> Actions Navigate Less options </div>							
<div>  Approve 1  Reject  Reopen </div>							
TYPE	DESCRIPTION	2 MON	3 TUE	4 WED	5 THU	6 FRI	STATUS
Job	Design	8	8	8	8	8	Approved 2

Analyze Reported Time

Click on Manager Time Sheet Cock Pit on your start page (when using StoryPoint Role Center “Projektledare”).


ACTIONS

[Time by Periods](#)
[Report Time This Week...](#)
[Manager Time Sheet Cockpit...](#)
[Job Journal](#)
[Resource Planning](#)

Add a date filter (1) to analyze a specific period.

You can see the resources (2) capacity (3), how many open (4), submitted (5), approved (6), posted (7), and rejected (8) hours for each resource.

Manager Time Sheet Cockpit

 Open in Excel

Options

Date Filter


18-04-01..18-04-301

Lines | Manage

NO.	NAME2	CAPACITY3	OPEN4	SUBMITTED5	APPROVED6	POSTED7	REJECTED8
R0010	John Doe	168	8		185	117	

Restrict Which Jobs Resources Can Report Time On

1. To restrict resources to only report time on jobs that they have a price on, go to Jobs Setup

- Press ALT+Q or 
- Type jobs setup (1) and select it (2)

TELL ME WHAT YOU WANT TO DO

1 jobs setup

Go to Pages and Tasks

2 > Jobs Setup Administration


2. Expand Fast Tab StoryPoint
3. Change Time Sheet, Jobs w Res. Price to yes (1)

StoryPoint

Default Print Layout Code	CERT2	Get Invoice Details From	Bill-To Customer
Time Sheet, Jobs w. Res. Price	<input checked="" type="checkbox"/> 1	Invoicing Type Required	<input type="checkbox"/>

Export Absence

1. Search for Absence Export

- a. Press ALT+Q or 
- b. Type Absence Export in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO

1 Absence Export

Go to Pages and Tasks Show all (18)

2 > Absence Export Tasks

2. Fill in a date filter (1) if you want to export absence for a specific period, then click OK (2).

EDIT - ABSENCE EXPORT

Saved Settings

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

General

Date Filter 1 18-04-01..18-04-30

Aggregate per Absence Code and... ☐

Resource Dimension Filters >

Resource

Show results:

Where: No. is:

And: Resource Group No. is:

Employee Absence

Show results:


Where: Cause of Absence Code is:

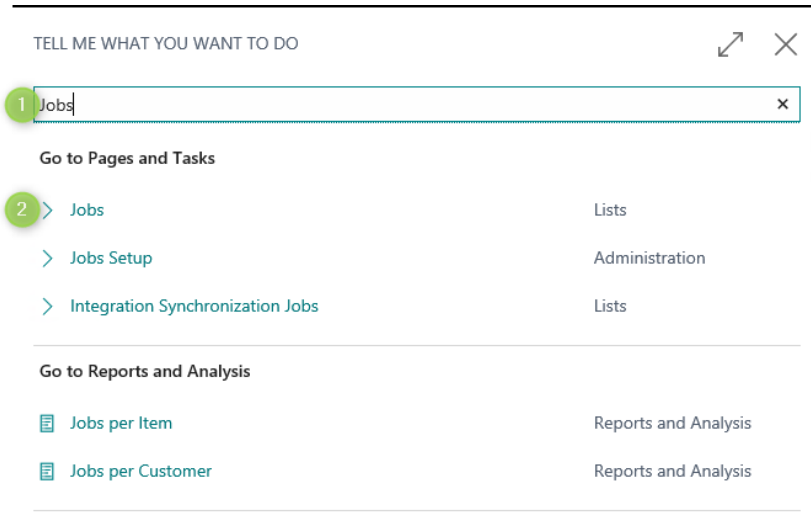
Schedule... OK 2 Cancel



3. The file will be saved in the format you have chosen in Human Resources Setup.


Create a Job

1. Search for Job

- a. Press ALT+Q or 
- b. Type Jobs in search field (1) and select it (2)



TELL ME WHAT YOU WANT TO DO  

1 Jobs 

Go to Pages and Tasks

2 > Jobs Lists

> Jobs Setup Administration

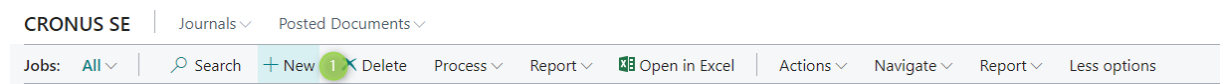
> Integration Synchronization Jobs Lists

Go to Reports and Analysis



Jobs per Item Reports and Analysis

Jobs per Customer Reports and Analysis

2. Click on New (1)



CRONUS SE | Journals ▾ Posted Documents ▾

Jobs: All ▾ Search  + New 1  Delete Process ▾ Report ▾  Open in Excel Actions ▾ Navigate ▾ Report ▾ Less options

3. The Job card is opened

- a. Create a new number by typing in a number manually or press enter if your settings allows automatic numbering (1)
- b. Type in a description (2)
- c. Choose a Bill-to customer (3), this field is mandatory. For internal jobs use an internal customer.
- d. Choose a Person Responsible (4). (You can filter the job journals on this value)
- e. Type in a job task number (5) and a description of your choice
- f. If the task should have a price, set Default Chargeable to Yes (6)
- g. If the task should be billable, choose Billable in Default Line Type
- h. When all mandatory fields are filled in, change the status to open (8)

P00090 · New Project

[Process](#)
[Report](#)
[Prices](#)
[Actions](#)
[Navigate](#)
[Report](#)
[Less options](#)

General

[Show more](#)

No. 1	P00090	Person Responsible 4	JEFF
Description 2	New Project	Blocked	
Bill-to Customer No. 3	20000	Last Date Modified	2019-01-16
Bill-to Contact No.	KT000003	Project Manager	
Bill-to Name	Trey Research		

Tasks

[Manage](#)[More options](#)

JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	WORK TYPE CODE	6 DEFAULT CHARGEABLE	7 DEFAULT LINE TYPE	BILLABLE (TOTAL PRICE)	BILLABLE (INVOICED PRICE)	TIME SHEET (TIME)
1000	Job Management	Posting		<input checked="" type="checkbox"/>	Billable	-	-	-
2000	Other non chargeable tasks	Posting		<input type="checkbox"/>		-	-	-
3000	Total	Total		<input type="checkbox"/>		-	-	-

Posting


[Show more](#)


Status 8	Open	% Invoiced	0.00
Job Posting Group	SERVICE	Invoicing Type	MONTH
% Completed	0.00	Print Layout Code	CERT


Copy a Job

You can create a new job by copying an existing job.

1. Search for Jobs

- Press ALT+Q or 
- Type Jobs in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO 

1 Jobs 


Go to Pages and Tasks


2 > Jobs Lists

> Jobs Setup Administration

> Integration Synchronization Jobs Lists

Go to Reports and Analysis

 Jobs per Item Reports and Analysis

 Jobs per Customer Reports and Analysis

2. Click on Copy Job (1)

CRONUS SE | Journals ▾ Posted Documents ▾

Jobs: All ▾ | Search + New ✕ Delete Process ▾ Report ▾ Open in Excel Actions ▾ Navigate ▾

NO.	DESCRIPTION		BILL-TO NAME
		<div>Copy Job... 1</div> <div>Job Task Lines</div>	<div>Copy a job and its job tasks, planning lines, and prices.</div>

3. Job No. (1) is mandatory. Make the changes that suits you best and Click OK. Your new job is created.

EDIT - COPY JOB

Copy from

Job No. 1	P00120 ▾	Incl. Planning Line Type	Budget+Billable ▾
Job Task No. from . . . . .	...	Incl. Ledger Entry Line Type .	Usage+Sale ▾
Job Task No. to . . . . .	...	Starting Date . . . . .	...
Source	Job Planning Lines ▾	Ending Date . . . . .	...

Copy to

Job No. . . . .	...	Bill-To Customer No.	20000 ▾
Job Description	New Project		

Apply

Copy Job Prices	<input type="checkbox"/>	Copy Dimensions	<input checked="" type="checkbox"/>
Copy Quantity	<input type="checkbox"/>		

OK Cancel

Create Job Planning Lines

To create a job planning line manually from the job card.

1. Open the job you want to add planning lines to
2. Click in Job Planning Lines (1)

← JOB CARD ✎ + 🗑

P00090 · New Project

Process | Report | Prices | Actions | Navigate | Report | Less options

Change Customer...
Copy Job Tasks to...
Update Invoice Details...
Statistics
Ledger Entries

Copy Job Tasks from...
Job Task Lines
Job Planning Lines 1
Attachments

Description New Project

Bill-to Customer No. 20000

Bill-to Contact No. KT000003

Bill-to Name Trey Research

Blocked ▼

Last Date Modified 2019-01-16

Project Manager ▼

Tasks | Manage | More options

JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	WORK TYPE CODE	DEFAULT CHARGEABLE	DEFAULT LINE TYPE	BILLABLE (TOTAL PRICE)	BILLABLE (INVOICED PRICE)	TIME SHEET (TIME)
1000	Job Management	Posting		<input checked="" type="checkbox"/>	Billable	-	-	-
2000	Other non chargeable tasks	Posting		<input type="checkbox"/>		-	-	-
3000	Total	Total		<input type="checkbox"/>		-	-	-

3. Add a new line

- a. Choose job task number (1)
- b. Choose line type (2) Billable or Both Budget and Billable if you want to invoice this row. Choose Budget if it's a budget row
- c. Choose a date in Planning Date (3)
- d. Choose what Type (4) you
- e. NO. (5) is depended on what type (4) you have chosen.
- f. Add a description (6), quantity (7) and a unit price (8)

← P00090 NEW PROJECT 1000 JOB MANAGEMENT

Job Planning Lines

Search + New Edit List Delete | Process | Report | Open in Excel | Actions | Navigate | Report | Less options

JOB TASK NO.	LINE TYPE	PLANNING DATE	PLANNED DELIVERY DATE	DOCUME... NO.	TYPE	NO.	DESCRIPTION	QUANTITY	UNIT COST	TOTAL COST	UNIT PRICE	LINE AMOUNT
1000	Billable	2018-04-09	2018-04-09		G/L Account	3051	Description	1	0.00	0.00	10 000.00	10 000.00

Create Job sales Invoices

1. Search for Job Create Sales Invoice

- a. Press ALT+Q or
- b. Type Job Create Sales Invoice in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO



1 Job Create Sales Invoice

On current page (Role Center)

Show all (7)

Job Analysis

Job - Planning Line

Job Suggested Billing

Go to Pages and Tasks

Show all (50)

2 > Job Create Sales Invoice

Tasks

2. If you do not apply any filters and presses OK, you will create sales invoices for all jobs with billable job planning lines

EDIT - JOB CREATE SALES INVOICE

Options

Posting Date 2018-04-09

Create Invoice per Job ▼

Job Task

Show results:

Where: Job No. ▼ is: ▼

And: Job Task No. ▼ is:

Limit totals to:

And: Planning Date Filter ▼ is:

5 invoices are created.

OK

3. To see the created sales invoices

- a. Press ALT+Q or



- b. Type Sales Invoices in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO



1 sales invoices

Go to Pages and Tasks

Show all (33)

2 > Sales Invoices

Lists

> Create Recurring Sales Invoices

Tasks

> Job Create Sales Invoice

Tasks

4. Review the created invoices and then choose to post or delete the invoices


← SALES INVOICES

Search + New Manage Release Posting Invoice Request Approval Open in Excel Actions Navigate Report Less options									
Post Post and Send... Post Batch...									
NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	SELL-TO CONTACT	POSTING DATE	LOCATION CODE	ASSIGNED USER ID	DUE DATE	
102236	30000	School of Fine Art			2018-04-09			2018-04-30	
102239	30000	School of Fine Art			2018-04-09			2018-04-30	
102240	10000	Adatum Corporation		Jens Lind	2018-04-09			2018-05-09	
102241	10000	Adatum Corporation		Jens Lind	2018-04-09			2018-05-09	
102242	10000	Adatum Corporation		Jens Lind	2018-04-09			2018-05-09	

Apply Usage Link and Track Time

In order to track time and see how much time is left of the budgeted time you need to apply usage link on the jobs you want to track.

1. Search for Jobs

- Press ALT+Q or 
- Type Jobs in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO

1 Jobs

Go to Pages and Tasks

2 > Jobs Lists

> Jobs Setup Administration

> Integration Synchronization Jobs Lists

Go to Reports and Analysis

Jobs per Item Reports and Analysis

Jobs per Customer Reports and Analysis

2. Open the job you want to track. Select YES to “Apply Usage Link”

Posting Show less

Status	Open ▼	% Completed	18,52
Job Posting Group	▼	% Invoiced	0,00
WIP Method	▼	% of Overdue Planning Lines	83,33
WIP Posting Method	Per Job ▼	Invoicing Type	▼
Allow Budget/Billable Lines	<input checked="" type="checkbox"/>	Print Layout Code	▼
Apply Usage Link	<input checked="" type="checkbox"/>		

3. To set Apply Usage Link by Default on all new jobs, go to Jobs setup and select YES to “Apply Usage Link by default”.

Jobs Setup


General

Automatic Update Job Item Cost ☐

Apply Usage Link by Default ☒

Resource Planning

Plan time for resources with the Resource Planning Matrix.

1. Search for Resource Planning
 - a. Press ALT+Q or 
 - b. Type Resource Planning in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO ↗ ✕


1 resource planning

Go to Pages and Tasks

2 > Resource Planning Tasks

2. Add a new row to plan time on by selecting Insert Job Task (1) or Insert Absence (2) under New in the menu bar.

Resource Planning

New Process Filter Periods  Open in Excel

+ Insert Job Task 1 + Insert Absence 2

- a. Insert job Task:
 - i. Select resource No (1). Default is the resource the current user is connected to.

- ii. Select Job No (2). Select any job from the Job list. If the status on the Job is Quote than the added activity will be categorized as Opportunity and if the status is Open the line will be Planned.
- iii. Select Job Task No (3) or type in a new number.
 1. If the field is left blank, Create Task (4) will be set to YES, but in order to create a new task you need to type in the number in Job Task No.
- iv. Type a description (5) or use the existing description
- v. Select YES in Usage Link (6) in order to track time and money from planned/budgeted to used and invoiced.

The screenshot shows a dialog box titled "OK & New" with a sub-header "INSERT JOB TASK". It contains several input fields and checkboxes, each with a green circular callout number:

- Callout 1: Resource No. dropdown menu showing "BRITTA".
- Callout 2: Job No. dropdown menu showing "JOB00010".
- Callout 3: Job Task No. dropdown menu showing "1020".
- Callout 4: Create Task checkbox, currently unchecked.
- Callout 5: Description text field containing "Granska och signera".
- Callout 6: Usage Link checkbox, currently checked.

At the bottom right, there are "OK" and "Cancel" buttons.

3. The Resource Planning Matrix contains of options (1) to view the matrix by week or month and the possibility to change what the resource hours sums up.
 - a. Use the filter tab (2) to set filters on resources, planning lines and/or jobs.
 - b. In the column type you can see what the status (3) is for the Job. The status planning is handled as an opportunity, where the hours are summed up (4).
 - c. When you add hours in the matrix (5) job planning lines are created and you can access them by clicking on the number (5).

Resource Planning

New Process Filter Periods Open in Excel

Matrix Options 1

View by Week ▾
Show Resource Quantity as Planned ▾

Filters 2

RESOURCE FILTER

Resource No.
Resource Group
Resource Category
Resource Type ▾

PLANNING LINE FILTER

Description

JOB FILTER

Job No.
Job Description
Customer No.
Customer Name
Job Status ▾

NAME	DESCRIPTION	TYPE	W15 APR 2019	W16 APR 2019	W17 APR 2019	W18 APR 2019	W18 MAY 2019	W19 MA
Britta Simon		Resource	10	10	-	-	-	
School of Fine Art - Ombygg...	Rådgivning	Open	10	10	-	-	-	
Trey Research - Nya kontors...	Förb. för installation	Planning	5	-	-	-	-	
Britta Simon		Rem. Cap.	30	30	40	16	24	
Britta Simon		Rem. Cap. after Opp.	25	30	40	16	24	
		Total Absence	-	-	-	-	-	
		Total Rem. Cap.	30	30	40	16	24	
		Total Rem. Cap. after Opp.	25	30	40	16	24	
		Total Planned	10	10	-	-	-	
		Total Planned incl. Opp.	15	10	-	-	-	

Apply a new Invoice Layout for a Job

Use Print Layout Codes in combination with Sales Invoice Jo in order to have different layouts on invoices for different jobs.

1. Search for Jobs

a. Press ALT+Q or

b. Type Jobs in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO

1 Jobs

Go to Pages and Tasks

2 > Jobs Lists

> Jobs Setup Administration

> Integration Synchronization Jobs Lists

Go to Reports and Analysis

Jobs per Item Reports and Analysis

Jobs per Customer Reports and Analysis

2. On Posting tab (1) expand the list of Print layout Codes (2), select New (3) to add a new Print Layout.

Posting **1**

Status: Open | % Completed: 2,97 | Invoicing Type: | Job Posting Group: INREDA | % Invoiced: 0,00 | Print Layout Code: **2**

Duration >

Foreign Trade >

3 + New

CODE	DESCRIPTION
(There is nothing to show in this view)	

Select from full list

3. Fill in a Code (1) and a description (2).
 To have an invoice layout where no details are showing, select YES to Hide Details (3).
 If the invoice should include headers select Yes to which headers to be displayed (4).
 If the invoice also should include totals at the end, select YES to which totals to be displayed (5). To hide specific information from the invoice lines, select Yes to which information to be excluded from the invoice (6).

Manage Show Attached

SELECT - JOB PRINT LAYOUT CARD

General

Code **1**: NO DETAILS | Hide Details **3**: ☒

Description **2**: No details

Headers **4**

Show Job Headers: ☐ | Show Resource Headers: ☐ | Show G/L Account Headers: ☐
 Show Task Headers: ☐ | Show Item Headers: ☐

Totals **5**


Show Job Totals: ☐ | Show G/L Account Totals: ☐ | Hide Item Summary Quantity: ☐
 Show Task Totals: ☐ | Hide Job Summary Quantity: ☐ | Hide G/L Account Summary Qty: ☐
 Show Resource Totals: ☐ | Hide Task Summary Quantity: ☐ | Hide Resource Summary Quantity: ☐
 Show Item Totals: ☐

Resource Lines **6**

Hide Resource No.: ☐ | Hide Description: ☐
 Hide Date: ☐ | Hide Quantity: ☐

OK Cancel

Search for Report Selection - Sales and make sure that the Sales Invoice Job is selected in order to use the Print Layout Codes.

- a. Press ALT+Q or 
- b. Type Report Selection Sales in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO

report selection sales **1**

Go to Pages and Tasks

> Report Selection - Sales **2** Administration

- c. Select Invoice in Usage (1) and Sales Invoice Job on the row (2)

REPORT SELECTION - SALES | WORK DATE: 2021-03-01 ✓ SAVED

Usage 1 Invoice


Manage

SEQUENCE	REPORT ID	REPORT CAPTION	USE FOR EMA... BODY	USE FOR EMA... ATT...	EMAIL BODY LAYOUT DESCRIPTION
1	70219910	Sales Invoice Job	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-

StoryPoint Setup

Use StoryPoint Setup to see an overview of the functionality and information connected to StoryPoint and start using it.

1. Open StoryPoint Setup

- a. Press ALT+Q or 
- b. Type StoryPoint Setup in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO ↗ ✕

1 storypoint setup

Go to Pages and Tasks

2 > StoryPoint Setup Administration

2. The number series that need to be setup are listed on fast tab Setup (1) along with the number of users in user setup
3. All the lists within StoryPoint and how many posts in each list are displayed under Lists (2)

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