INFOTECH CONSULTING GROUP

1062 Oak Forest Dr.
Suite 100
Onalaska, WI 54650
www.infotech-inc.com

608-783-1110 Phone
877-783-2113 Toll Free
608-783-1221 Fax

Infotech Sign365 User Guide

This user guide explains how to use Infotech Sign365 in Microsoft Dynamics 365 Business Central.

Contents

Getting Started

Audience

This guide is for end users working with Sign365 in Business Central, including:

- Sales
- Project Managers / Coordinators
- Production / Shop Floor
- Purchasing
- Accounting / Billing
- Administrators

Prerequisites

- You have access to a Business Central environment where Infotech Sign365 is installed.
- You have the required permission sets to access the pages and actions used in your role.

Finding Sign365 features

Sign365 extends standard Business Central pages (especially Job-related pages) and provides additional pages, page extensions, and reports. Your available navigation depends on your role and permissions.

How to find pages (recommended)

1. Use Business Central search (Tell Me) and search for the page caption.
2. If multiple pages have similar names, confirm you are opening the Sign365 page by checking:
    1. The page layout (Sign365 lists often include project-specific fields and filters)
    2. Whether the page opens the standard project/job card when you drill down
3. If you cannot find a page by caption, contact your administrator to confirm your permissions.

Common Concepts

Jobs and Job Tasks

Sign365 is built around Business Central Job Management.

- **Job**: Represents a customer project/job.
- **Job Task**: A breakdown of the job into tasks for planning and tracking.

Posting and Billing

Job activity typically flows through planning, execution, and billing steps. The exact posting and billing steps depend on your organization's process and permissions.

End-to-end workflow overview

This is the typical lifecycle that Sign365 supports. Your organization may skip or rename steps.

1. Sales creates and maintains customer-facing details and monitors quotes/orders.
2. Project management creates/maintains project tasks, dates, and planning details.
3. Purchasing procures and receives materials for projects.
4. Production/shop floor executes work and records labor (and sometimes material consumption).
5. Accounting/billing validates billing readiness, handles deposits (if used), invoices, and reviews WIP/recognition.

Key information you will use across workflows

- Project number (Job No.)
- Project task number (Job Task No.)
- Customer (Sell-to / Bill-to)
- Responsible person / project manager
- Key dates (order/release dates, due dates, work completed date)

Role-Based Workflows

Sales

Where you typically work

- Sales quotes and sales orders (standard Business Central)
- Sign365 job lists for sales:
  - `Sign365 Project List - Sales`
  - `Active Quotes`
  - `Project List`
  - `Pre-Sales Activities`
  - `Dead or Lost Projects`

Create a job from a quote/order

- Identify the customer and the related sales quote/order.
- Create or select the related job number.
- Confirm that job and job task references are populated where required.
- For job visibility and follow-up, use Sign365 lists like:
  - `All Active Quotes`
  - `All Active Orders`

Maintain customer-facing job details

- Confirm customer order references and key dates.
- Ensure any required job comments are recorded.
- Useful pages for context and history:
  - `Project History`
  - `All Comments`

Project Management / Coordination

Where you typically work

- Job list and job card (standard Business Central)
- Sign365 planning and tracking pages:
  - `Project Planning`
  - `Project Task Completion`
  - `Project Tracker`
  - `Projects Need Scheduling - QE`
  - `Projects Scheduled - QE`

Plan job tasks

- Review job tasks and expected dates.
- Confirm job task structure matches the work breakdown.
- Use:
  - `Project Planning`
  - `Default Project Task List` (when selecting/standardizing task structures)

Track progress

- Monitor job status and task completion.
- Review job comments and key milestones.
- Use:
  - `Project Task Completion`
  - `Project Task Completion (All)`
  - `Project Ledger Entries`
  - `Project Ledger Entries w/Costs`

Production / Shop Floor

Where you typically work

- Shop role centers and shop lists:
  - `Role Center (Shop Floor)`
  - `Role Center (Shop Floor Supervisor)`
  - `Fabrication List`
- Department queues/pages (examples):
  - `Fabrication List`
  - `Paint List`
  - `Final Assembly List`
  - `Crating`
  - `Substrate Cut/Prep List`
  - `Vinyl List`
  - `Neon List`
  - `Production Art List`

Execute work

- Use the shop role center and department pages to find assigned work.
- Open the job, confirm job/task context, and follow internal SOPs for:

- Material staging
  - Production steps
  - Quality checks
- Record time/material usage per job/task where applicable.

Purchasing

Where you typically work

- Purchasing activity pages:
  - `Purchasing Activities`
  - `Purchase Lines List`
  - `Purchase line Info`
  - `Inv and Supply Purchase List`

Purchase for a job

- Ensure purchase documents include the appropriate job and job task references.
- Validate that purchasing aligns to the job plan and required dates.
- Use `Purchase Lines List` to review and filter purchasing lines tied to jobs.

Accounting / Billing

Where you typically work

- Accounting and invoicing pages:
  - `Invoicing Activities`
  - `Billing Review Complete to Inv`
  - `Work Completed - Not Invoiced`

Prepare billing

- Review job status and completion readiness.
- Confirm postings and any required dimension information.
- Use job lists for billing readiness:
  - `Released for Billing - QE`
  - `Orders Released for Billing`

Review job costs and progress

- Use `Project Analysis` and job ledger entry pages to review performance.
- Use job WIP tools/pages as provided by your process:
  - `Project WIP G/L Edit`
  - `ICG - Update Project WIP Dimension`

Step-by-step guides

This section provides task-oriented procedures. Some steps depend on configuration and permissions.

Working with project lists (common pattern)

Use the project lists to find the right project quickly.

1. Open the relevant list page for your role (examples: `Project List`, `Active Quotes`, `Sign365 Project List - Sales`).
2. Filter to the projects you need:
    1. Filter by project/customer
    2. Filter by responsible person/project manager
    3. Filter by date fields where available
    4. Clear filters when switching customers/projects to avoid acting on the wrong record
3. Open the project:
    1. Choose the project number to open details
    2. Confirm you are on the correct project before making updates

Checklist before updating a project:

- Confirm project number and customer
- Confirm project status (quote/planning/open/completed)
- Confirm you are updating the correct company and environment

Sales: from quote to project follow-up

Track quotes in progress

1. Open `Active Quotes`.
2. Filter by sales person, customer, and date as needed.
3. Open the project and review key customer-facing fields.
4. Update notes/comments per your process.

Checklist (quotes):

- Confirm next-step dates are maintained
- Confirm responsibilities are assigned
- Confirm any required customer deposit expectations are documented (if used)

Create a project from a quote or order (standard Business Central)

This procedure describes the typical path where a sales quote/order is linked to a project.

1. Locate the quote/order in Business Central.
2. Confirm the customer and contact details are correct.
3. Create or confirm the related project:
    1. If the project already exists, confirm the project number matches the sales document.
    2. If the project does not exist yet, create it according to your organization's process.
4. Confirm project references on the sales document:
    1. Verify the project number is populated where applicable.
    2. Verify project task references are populated where required.
5. Confirm handoff readiness:
    1. Confirm promised dates and scope notes are captured.

    2. Confirm required documents (drawings/proofs) are attached if your environment uses attachments.

Checklist (handoff to project management):

- Customer approval status is clear
- Key dates are confirmed
- Deposit expectations are captured (if used)
- Required attachments are present (if used)

Common issues:

- Sales document is not linked to the correct project
- Project exists but task structure is missing or inconsistent

Review all active quotes and orders

1. Open `All Active Quotes` (for cross-team visibility).
2. Open `All Active Orders` (for cross-team visibility).
3. Use these lists to identify aging items and next steps.

Common issues:

- If a quote/order is missing from the list, verify it meets the list's filters (status and dates).
- If you cannot edit fields, verify permissions.

Follow up on active orders

1. Open `All Active Orders`.
2. Filter to your customer or your assigned projects.
3. For each order:
    1. Open the project.
    2. Confirm planning is started (`Project Planning`) or has been assigned to a coordinator.
    3. Confirm purchasing and production prerequisites are understood.

Tip: Treat `All Active Orders` as a "handoff dashboard" to ensure projects do not stall.

Project Management: project setup and planning

Create/confirm default task structure

1. Open `Default Project Task List`.
2. Review the template tasks and confirm they match your standard work breakdown.
3. When creating a new project, apply the default task structure as directed by your process.

Checklist (task template readiness):

- Task numbers and descriptions match internal standards
- Resource/team assignments exist where required
- Required task types and totaling rules are in place

Set up a new project (recommended checklist)

Use this checklist when you receive a new project from sales.

1. Confirm the project's header data:
    1. Customer
    2. Responsible person / project manager
    3. Key dates (order date, due date, target completion)
2. Apply a standard task structure:
    1. Use your template process (see `Default Project Task List`).
    2. Confirm task numbering and descriptions follow your internal conventions.
3. Validate operational readiness:
    1. Identify long-lead items and notify purchasing.
    2. Identify required approvals and ensure they are requested early.
4. Attach required documents (if enabled): drawings, proofs, permits, site notes.

Common issues:

- Project is created but not assigned (no responsible person)
- Due dates exist on the sales document but not reflected in planning

Plan the project

1. Open the project.
2. Open `Project Planning`.
3. Review scheduling fields (sales and manufacturing sections).
4. Confirm key dates (due dates, release dates) and required notes.
5. Save changes.

Checklist (planning):

- Due dates are consistent with customer commitments
- Internal notes required for production/billing are populated
- If scheduling queues are used, confirm the project appears in the correct queue

Schedule work using the scheduling queues

Use these pages to manage what needs scheduling and what is already scheduled.

1. Open `Projects Need Scheduling - QE`.
2. Review each project and confirm it has enough information to schedule:
    1. Task structure exists
    2. Target dates are set
    3. Required materials are ordered/available (as known)
3. Update planning information as needed (`Project Planning`).
4. Re-check the project in `Projects Scheduled - QE` after scheduling actions are complete.

Tip: Use `Project Tracker` to validate capacity and find conflicts.

Track task completion

1. Open `Project Task Completion`.
2. Filter to a specific project number if needed.
3. Update completion-related fields according to your process.
4. If you need to view across projects, use `Project Task Completion` (All).

Common issues:

- If you cannot change a field, confirm whether it is calculated or restricted by permissions.
- If totals look incorrect, verify task structure and totaling rules.

Use the project tracker

1. Open `Project Tracker`.
2. Filter by resource group/resource if needed.
3. Use this view to identify schedule conflicts and upcoming work.

Tip: Use this view during daily planning meetings to identify bottlenecks.

Review project costs while in progress

Use these pages to spot overruns early.

1. Open `Project Ledger Entries` for transaction-level review.
2. Use `Project Ledger Entries w/Costs` when you need cost visibility.
3. Use `Project Analysis` for higher-level review and profitability signals.

Scheduling queues

1. Open `Projects Need Scheduling - QE` to find projects that require scheduling.
2. After updates, use `Projects Scheduled - QE` to verify scheduled items.

Production / Shop Floor: execute and record work

Find work to do

1. Open the appropriate role center:
    1. `Role Center` (Shop Floor)
    2. `Role Center` (Shop Floor Supervisor)
2. Open the department list that matches your area:
    1. `Fabrication List`
    2. `Paint List`
    3. `Final Assembly List`
    4. `Crating`
    5. `Substrate Cut/Prep List`
    6. `Vinyl List`
    7. `Neon List`
    8. `Production Art List`
3. Select the project and review the current status and due dates.

Checklist (before starting work):

- Confirm project number and task
- Confirm you have the latest documents/attachments (if used)
- Confirm required materials are available or have been ordered

Record time and attendance (if enabled)

1. Follow your organization's process for clock-in/clock-out.
2. When recording time to projects/tasks:
    1. Confirm the correct project number and task
    2. Record time against the appropriate work type/resource/team
3. If your environment supports barcode/QR entry:
    1. Scan the code
    2. Confirm the project/task
    3. Record labor/material as prompted

Common issues:

- If you cannot post/submit time, confirm you are assigned to the correct team/resource group and have permissions.
- If time is posted to the wrong project/task, notify a supervisor immediately.

Supervisor review (if enabled)

1. Review submitted time/labor entries.
2. Correct errors (wrong project/task, incorrect quantities) according to policy.
3. Approve entries so they can flow to costing and payroll processes.

Purchasing: buy and receive for projects

Review purchasing workload

1. Open `Purchasing Activities`.
2. Drill down from cues to the underlying lists as needed.

Checklist (purchasing setup):

- Vendor and item/resource are correct
- Dates (expected receipt / due dates) are present
- Project number and task references are populated where required

Create a purchase order for a project (recommended)

1. Create a purchase order using standard Business Central purchasing.
2. For each line that is related to a project:
    1. Populate project number and (if required) project task number.
    2. Confirm quantity and expected receipt date.
3. If a line must be received directly to a project (not stocked), follow your organization's receiving rules.
4. Release the purchase order if required by your process.

Checklist (before sending the PO):

- Vendor, pricing, and lead time confirmed
- Project and task references are correct
- Expected receipt date aligns with production schedule

Review purchase lines tied to projects

1. Open `Purchase Lines List`.
2. Filter by project fields (job/project references) as applicable.
3. Review expected receipt dates and outstanding quantities.
4. Resolve exceptions (missing project references, missing dates) before receiving/posting.

Common issues:

- Lines without a project reference may not be attributable to project costing.
- Incorrect dates may cause missed production deadlines.

Receiving and exception handling (common approach)

1. Receive items using your standard Business Central receiving process.
2. If receiving cannot be completed:
    1. Confirm the line is released and has a valid quantity.
    2. Confirm the item tracking requirements (if any) are met.
    3. Confirm project references are present where required.
3. If the wrong project/task was used:
    1. Stop and notify your purchasing lead/supervisor.
    2. Correct according to policy before posting additional receipts.

Review invoice line details

1. Open `Purchase line Info`.
2. Filter by document number or vendor.
3. Use this page for investigation and reconciliation.

Review inventory and supply purchases

1. Open `Inv and Supply Purchase List`.
2. Review due dates and requester/purchaser fields.
3. Use this as a follow-up list for items that must arrive for production.

Accounting / Billing: billing readiness, invoicing, and WIP

Monitor billing work queues

1. Open `Invoicing Activities`.
2. Use the cues to drill into:
    1. `Released for Billing - QE`
    2. `Billing Review Complete to Inv`

Checklist (billing readiness):

- Project status indicates work is ready for billing
- Required billing notes are present
- Deposits and prior invoices are considered (if used)

Billing review to invoice (recommended workflow)

This is a recommended pattern for moving from “billing ready” to invoice.

1. Start with `Released for Billing - QE`.
2. For each project:
    1. Open the project and confirm completion status and required billing notes.
    2. Confirm any required approvals are complete.
3. When billing review is complete, confirm it moves into `Billing Review Complete to Inv`.
4. Create and post the invoice using your standard Business Central invoicing process.
5. After posting:
    1. Confirm the invoice is recorded and visible to AR.
    2. Confirm deposits were applied (if used).

Common issues:

- Project appears billing-ready but required fields are missing
- Invoice is created but deposits do not apply as expected

Monitor work completed but not invoiced

1. Open `Work Completed - Not Invoiced`.
2. Confirm required billing fields are complete.
3. Coordinate with project management to resolve missing information.

Tip: Use this list as a daily “aging” queue.

Orders released for billing

1. Open `Orders Released for Billing`.
2. Review what is waiting on billing processing.
3. Ensure deposits and prior invoices are considered (if used in your process).

Project analysis

1. Open `Project Analysis`.
2. Filter to a project or portfolio.
3. Use this view to review profitability and status.

WIP tools

1. Use `Project WIP G/L Edit` for WIP entry investigation/editing (per permissions).
2. Use `ICG - Update Project WIP Dimension` when dimension updates are required for WIP entries (per policy).

Customer deposits (if used)

If your organization uses customer deposits, the goal is to make sure deposits are:

- Recorded against the correct customer/project
- Applied correctly on invoices
- Visible to billing before final invoicing

Recommended process:

1. Confirm deposit requirements during sales/order entry.
2. When the deposit is received:
   1. Record the deposit using your organization's standard payment process.
   2. Confirm the payment is tied to the correct customer and (if applicable) the correct project.
3. Before invoicing:
   1. Confirm deposits exist and are available to apply.
   2. Confirm the invoice reflects the expected application of deposits.
4. After invoicing:
   1. Validate the deposit application on posted documents.
   2. If the deposit did not apply as expected, do not post additional corrections until the issue is understood.

Common issues:

- Deposit recorded to the wrong customer
- Deposit recorded but not applied due to document/application mismatches

Revenue recognition (if used)

If your organization uses WIP and/or revenue recognition:

1. Confirm project/job status and completion milestones are accurate.
2. Confirm dimensions are correct for postings (department, project type, etc.).
3. Use reporting outputs to review recognized amounts and reconcile to internal expectations.

Document management and attachments (if enabled)

Many Sign365 deployments support attaching documents (files, emails, photos, videos) to Business Central records.

Common use cases:

- Attach drawings and proofs to sales documents
- Attach site photos to project records
- Attach vendor confirmations to purchasing documents

Recommended process:

1. Attach documents early (quote/order stage) so they are available downstream.
2. Use consistent naming so the next department can find files quickly.

3. When a project moves stages (quote to order to invoice), confirm the attachments you need are present.

Recommended naming (example pattern):

- Customer - ProjectNo - DocumentType - Date

Example:

- ACME - 100123 - Drawing - 2025-12-23

Checklist (attachments):

- Attachments are added to the correct record (project vs. quote vs. order)
- File names are understandable outside the originating department
- Sensitive information is handled per policy

If your environment supports external storage (for example SharePoint):

1. Follow the company folder structure.
2. Avoid creating one-off folders unless required by policy.

Common issues:

- Files attached to the wrong record, so downstream users cannot find them
- Duplicate attachments stored in multiple places without clarity which is current

---

Approvals and workflows (if enabled)

Some deployments require approvals before a document can be released or posted.

Recommended process:

1. If an action is blocked:
    1. Read the message carefully.
    2. Check whether approval is required.
2. Submit for approval using your company's workflow.
3. After approval:
    1. Re-open the document.
    2. Re-run the action.

Reports

How to use reports

When running reports:

1. Start from the project or list page when possible so filters are automatically applied.
2. If you run a report from the search:
    1. Set filters carefully (project number, date ranges, responsible person)
    2. Save request page settings if your organization uses standard report presets

3. Validate output:
    1. Confirm the project number range
    2. Confirm the date range
    3. Confirm currency and amounts as applicable

Report list (by role)

Sign365 includes additional reports and may substitute standard reports in some workflows.

Sales / Estimating

- `Project Order Estimate`
- `Project List`
- `Print Only Invoice`

Project Management / Production

- `Project Traveler - Bar Coded`
- `Project Traveler Task/Planning`
- `Green Card`
- `Work Order`
- `Work Order - Template`
- `Production Meeting Detail`

Purchasing

- `PO_s ON ProjectS`
- `Purchase Document - Test`
- `Purchase Order`

Accounting / Billing

- `WIP Trial Balance`
- `Recognition in Projects`
- `WORK FINISHED BUT NOT BILLED`
- `INVOICED NOT COMPLETED`

Additional capabilities (configuration-dependent)

The following capabilities may be available depending on your environment and licensed components.

Document management and attachments

See `Document management and attachments (if enabled)` for recommended processes, naming, and common issues.

SharePoint integration

- Some deployments integrate with SharePoint using a template folder structure

Comments and notes

- Sign365 expands the use of comments across multiple process areas
- Some deployments use rich-text editing where enabled

HR features

- Some deployments include HR elements such as employee teams and PTO tracking

Workflows and approvals

See `Approvals and workflows (if enabled)` for the recommended process.

Power BI and automation

- Some deployments integrate with Power BI and Power Automate

Administration

Manage permissions

- Assign users the required permission sets.
- Validate that users can access the pages/actions required for their role.

Support operations

- Help users troubleshoot permission and configuration issues.

Common Tasks

Add or update job comments

- Locate the job record.
- Add or update comments per your process.

Confirm job and job task references on documents

- When working with sales or purchase documents, verify `Job No.` and `Job Task No.` where required.

Troubleshooting

I can’t see a page or action

- Verify you have the correct permission sets assigned.
- Contact your Business Central administrator.

Posting fails due to missing information

- Confirm required fields are populated (including job/task references when relevant).
- Re-run the action after correcting the missing information.

Glossary

- **BC**: Business Central
- **Job**: A project/job record in Business Central
- **Job Task**: A job sub-structure for planning/tracking
- **WIP**: Work in Progress

Support

Support URL: https://www.infotech-inc.com/infotech-sign365

Appendix A: Admin / Configuration Notes

This appendix is for administrators and implementers. It describes common configuration areas that must be in place for the end-user workflows in this guide to work as intended.

Permissions and access

- Confirm users have permission sets required for their role areas (Sales, Project Management, Shop Floor, Purchasing, Accounting/Billing).
- If users cannot see a page/action referenced in this guide, validate:
  - Their permission sets
  - Their assigned profile/role center
  - Any workflow approval restrictions

Role Centers

- Confirm the intended Role Centers are assigned and visible to the appropriate roles.
- If multiple role centers share the caption `Role Center`, ensure the correct profile configuration is applied for each department.

Project templates

- Define ownership for maintaining the `Default Project Task List`.
- Establish a change process for templates (approval, testing, and communication), because changes impact downstream reporting and task completion workflows.

Posting setup and dimensions

- Confirm which dimensions are required for project/job postings (for example department, project type).
- Validate that required dimensions are captured consistently from sales through purchasing, production, and billing.
- If WIP entries require dimension corrections, confirm who is allowed to use `ICG - Update Project WIP Dimension` and under what conditions.

Customer deposits (if used)

- Confirm whether deposits are enabled and which document types support them in your process.
- Define how deposits should be:
  - Recorded (payment process)
  - Tracked (visibility by project/customer)
  - Applied (invoice application expectations)

- Define escalation steps for “deposit recorded but not applied” scenarios.

WIP and revenue recognition (if used)

- Confirm whether your deployment uses WIP and/or revenue recognition for projects.
- Define:
    - When a project is considered “billing ready”
    - Which roles run WIP/recognition processes
    - How results are reviewed (reports, reconciliation)

Document management and storage (if enabled)

- Confirm where attachments are stored in your deployment:
    - Internal storage
    - Azure File Share
    - SharePoint
- If using SharePoint integration with a template folder structure:
    - Confirm the structure is deployed
    - Confirm naming rules and ownership
    - Confirm retention/security policies

Approvals and workflows (if enabled)

- Document which workflows are enabled (sales, purchasing, posting, etc.).
- Confirm approver assignments and delegation rules.
- Ensure end users understand which actions trigger approvals and how to resubmit after changes.

Shop floor time tracking (if enabled)

- Confirm time/attendance features are enabled and configured.
- Confirm resource groups/teams and posting rules are set up so labor can be recorded to the correct project/task.
- If barcode/QR entry is used:
    - Confirm devices and scanning flow
    - Confirm training and support process

Reporting and layouts

- Confirm which report layouts are deployed and supported in your environment.
- Validate that the report set is accessible by role and aligns to operational expectations.