



Job Cards 1 - Setting Up for Job Cards

(What must be in place before the first job card)

A job card is the document a service or repair job runs on. It is raised from a sales order whose only line is the job itself, and the materials the job uses are added on the card as it is worked. Before the first job card can be raised, four things must be in place.

1) Set the job up as a Service item in Sage. A job card can only be raised from a sales order whose single line is a Service item (not a stock item). In Sage Accounting create the item with the type Service, for example "Mould Service" or "Repair - Stroller". Give it a selling price if the job has a standard price; leave it at zero if the price is only known once the job is done.

Stock items cannot be the job line. To sell stock use a picking slip; to make stock use a works order.

2) Syncflo need to activate Module 2 for the company. Module 2 (Planning, Job Cards and Finished Goods Demands) must be active before the Job Card options appear. Contact Data Fusion support if the Job Card tile is not on your dashboard.



3) Choose the Cost of Sales account for internal materials. Configuration > Company > "Job cards: Cost of Sales account for internal materials". When materials are used on a job but not shown to the customer, their cost is journalled to this account.

Sage integration

Auto Update Sage on Picking Complete ☐

Auto Generate Sage Tax Invoices ☐

Allow purchase price to be changed on receiving ☐

Part deliveries: keep the Sales Order open and invoice once, when it is complete ☐

Job cards: Cost of Sales account for internal materials

Use Produce Weights (for deliveries, shipping etc) ☒

Sage field name used for Unit weight

Modules

Module 2 Active ☒

Mobile Module Active ☒

Slim - Works Orders Only version ☐

Module 3 Active ☒

(Grants the Mobile Picking tab & the scanner (mobile) app for this company)

(Works Orders, BOMs and Items only. On-hand and costs come from Sage, one SAGE store, no lots or roles. Contact us if you want it switched on or off.)

4) Check the Stock Adjustment account. Settings > GL Account Access: one account must be marked as the Stock Adjustment account. Internal materials are adjusted out of Sage stock against it. Without both accounts a job card with internal materials refuses to update Sage and says which account is missing.

GL Account Access

Choose which GL accounts may be used, and where. Only one account can be the Stock Adjustment Account.

Acct ID	Name	Category	Job Cards	Additional Costs	Stock Adjustment Account
459644	Other Sales	Sales	☒	☐	☐
459642	Owners Contribution	Owners Equity	☐	☐	☐
459645	Unallocated Income	Other Income	☐	☐	☐
459618	Bad Debts Recovered	Other Income	☐	☐	☐
459619	Interest Received	Other Income	☐	☐	☐
459640	Bank Loans	Non-Current Liabilities	☐	☐	☐
459634	Fixed Assets - Furniture & Fittings	Non-Current Assets	☐	☐	☐
459637	Fixed Assets - Motor Vehicles	Non-Current Assets	☐	☐	☐
459638	Fixed Assets - Equipment	Non-Current Assets	☐	☐	☐
459643	Income Tax	Income Tax	☐	☐	☐
459635	Telephone & Internet	Expenses	☐	☐	☒
459636	Travel & Accommodation	Expenses	☐	☐	☐

Next document → Job Cards 2 - Creating a Job Card from a Sales Order