



Job Cards 2 - Creating a Job Card from a Sales Order

(Turning the customer's order into the instruction for the job)

A job card is always created from a sales order. The order must have exactly one line, and that line must be a Service item: it is the job the customer is paying for. The materials are not on the order; they are added on the job card by the people doing the work.

1) Raise the sales order in Sage with the service item as its only line, at the agreed price (or zero if the price is only known once the job is done). Data Fusion picks the order up on the next sync; it appears under Sales Orders.

Sales Orders (27)

Find (Cust/SO#/Ref) Status SO Status Due Date <= Delivery ☐ Completed ☒ Active

SO #	Customer	Address_3	Reference	Pick Slip	Job Card	Status	Due Date	Total	Start	Compl	SO_Status	Delivery
SO0000018	MamaMagic Expo			PS0000018		Checked	31 Mar 2025	14 662.44	☐	☐	Invoced	Courier Guy
SO0000019	No 2 Cash Sale			PS0000019		Checked	31 Mar 2025	1 661.74	☐	☐	Overdue	Dons Transport
SO0000023	Cash Sale		TREWO		123456	Captured	31 May 2025	1 954.99	☒	☐	Overdue	
SO0000025	Cash Sale			PS0000025		Captured	31 Jul 2025	575.00	☐	☐	Overdue	
SO0000028	Expo Demo	Del Suburb		PS0000028		Captured	31 Aug 2025	3 306.25	☐	☐	Pending	
SO0000029	Expo Demo	Del Suburb		PS0000029	AB12345	Captured	31 Aug 2025	.00	☐	☐	Pending	
SO0000030	Expo Demo			PS0000030		Captured	31 Aug 2025	29 324.89	☐	☐	Overdue	
SO0000032	MamaMagic Expo			PS0000032		Captured	31 Aug 2025	2 736.98	☐	☐	Pending	
SO0000033	No 2 Cash Sale			PS0000033		Captured	31 Aug 2025	1 954.99	☐	☐	Overdue	
SO0000034	POS International			PS0000034		Captured	30 Sep 2025	3 967.50	☐	☐	Overdue	
SO0000035	Cash Sale		ZZ123456WE	PS0000035		Captured	30 Sep 2025	1 971.01	☐	☐	Overdue	
SO0000042	MyBodyGuruTest						31 Dec 2025	13 549.76	☐	☐	Overdue	
SO0000043	POS Local			PS0000043		Captured	31 Dec 2025	287.75	☐	☐	Overdue	
SO0000044	Trident Cash Sale			PS0000044		Captured	31 Jan 2026	12 707.45	☐	☐	Pending	

2) Open the sales order and choose "Create Job Card" from the Create dropdown at the top.

Sales Order

Sales Order Details: SO0000068 (Pending)

Customer	Expo Demo	Address	Del Add here no 1	Picking Slip	
Due Date	31 Oct 2026	Doc Date	16 Oct 2026	Job Card	
Reference			Del Suburb	Issued To	
Sales Rep	Fred Brown			Status	

ItemCode	Description	Unit	Order Qty	Pick Qty	Excl Price	Disc%	Discount	SO Total
Serv Item1	Service item 1		1.00	0.00	9 874.23	0.00%	0.00	11 355.36

Message

Total Exclusive 9 874.23

Total Vat 1 481.13

Total 11 355.36

Cost: 0.00 CP: 0.00%

3) Type a job card number, or click "Auto-create a Number" to use the order number. Click "Yes, Do it".

If the order has more than one line, or its line is a stock item, the job card is refused and the message explains what to change: set the job up as a Service item, put it on the order as the only line, and add the materials on the job card.

The screenshot shows the 'Sales Order' interface. At the top, there are navigation buttons: 'Open Sales Orders' and 'Create Job Card'. The main header is 'Sales Order' with a sub-header 'Sales Order Details: SO0000068 (Pending)'. Below this, there are fields for Customer (Expo Demo), Due Date (31 Oct 2026), Address (Del Add here no 1), Picking Slip, Job Card, Reference, and Sales Rep (Fred Brown). A table below shows the order details with columns: ItemCode, Description, Unit, Order Qty, Pick Qty, Ext Price, Disc%, Discount, and SO Total. The table has one row: 'Serv Item1' with a quantity of 1.00 and a total of 11,355.36. A modal dialog titled 'Confirm, Open new Job Card' is open in the center. It has a 'From Store' dropdown set to 'Any/All', a text field for 'Enter Internal Job Card Reference', and two buttons: 'Auto-create Number' (highlighted with a mouse cursor) and 'Yes, Do it'. On the right side of the dialog, there is a summary table with rows: 'Total Exclusive' (9,874.23), 'Total Vat' (1,481.11), 'Total' (11,355.36), and 'Cost: 0.00' (GR 0.00%).

4) The job card opens. The service line is the job itself: it appears as the Job Card Summary and Qty of Items, not as a line in the grid. The grid is empty, ready for materials.

The screenshot shows the 'Job Card' interface. At the top, there are navigation buttons: 'Open Sales Orders', 'Sales Order', and 'Job Card Tracking'. The main header is 'Job Card' with a sub-header 'Job Card Details: JC0000068'. Below this, there are fields for Customer (Expo Demo), Due Date (31 Oct 2026), Address (Del Add here no 1), Sales Order (SO0000068), Reference, Sales Rep (Fred Brown), Delivery By, and Status (Captured). A 'Job Card Summary' section shows 'Service Item 1' with a 'Qty Of Items' of 1. Below this is a checkbox 'Print all additional lines' with the text 'Every line goes onto the invoice and delivery note.' Below the summary is a table with columns: Type, Selection, Description, Store, BarCode (Scan), Unit, Qty, Use Qty, and Done. The table is empty. Below the table are three message boxes: 'Job Card Message', 'Packing Message', and 'Delivery Message'. At the bottom, there are buttons: 'Delete', 'Print Preview', 'Save Edits' (highlighted), and 'Close off Job Card As Complete'. On the right side, there is a 'Process Trail' section with a table showing 'Date & Time' and 'Process'. The table has one row: '16/10/2026 9:58:04 am' and 'Captured'.

5) Issue the job card to a department with the + button next to "Issued To". This stamps the issue date and puts the card on the Job Card Tracking board.

The screenshot shows the 'Job Card Details' form for job card JC00000068. The form is divided into several sections: Customer (Expo Demo), Address (Del Address no 1), Sales Order (9000000068), Due Date (31 Oct 2026), Street Address, Issued To (with a '+' button), Reference, Del Suburb, Issue Date, Sales Rep (Fred Brown), Delivery By, Status, and Captured. Below these is a 'Job Card Summary' section with a 'Print all additional lines' checkbox and a note 'Every line goes onto the invoice and delivery note.' The 'Qty Of Items' is 1. An 'Issue To' dialog box is open in the center, with 'Role' and 'Department' fields, both containing the text 'Captured'. The 'Issue' button is at the bottom right of the dialog. The background form also shows a 'Description' field, a 'Job Card Message' field, a 'Delivery Message' field, and a 'Process Trail' button. The bottom right corner shows the date and time: 10/10/2026 8:58:44 pm.

Next document → Job Cards 3 - Working the Job Card: Materials and Services