



Job Cards 3 - Working the Job Card: Materials and Services

(Recording what the job uses, as it is used)

Everything the job draws from stock is recorded as a line on the job card. Ticking a line Done is what takes the stock out of the store, at that store's cost, so the job card is both the work instruction and the record of what the job cost in materials.

1) On the blank line choose the Type: Item for a stock item, Service for labour or a bought-in service, GL Account for a cost with no item. Then pick the item in Selection; the description fills in.

Type	Selection	Description	Store	BarCode (Scan)	Unit	Qty	Use Qty *	Done
Item	ACRG2000 ->	6009980532100 - Virgin Coconut oil 200ml				1		☐

2) For an Item choose the Store it is drawn from. Only stores holding that item are offered.

Job cards take untracked items only. A lot- or serial-tracked item is refused with: "Job cards take untracked items only - draw it on a works order, or make the item untracked."

Type	Selection	Description	Store	BarCode (Scan)	Unit	Qty	Use Qty *	Done
Item	ACRG2000 ->	6009980532100 - Virgin Coconut oil 200ml	PD			4	4	☒

3) Enter Qty (planned) and Use Qty (actually used). Tick Done when the stock has physically been taken. Ticking Done saves the line and moves the Use Qty out of the store. If Use Qty is left empty, it is filled from Qty.

Type	Selection	Description	Store	BarCode (Scan)	Unit	Qty	Use Qty *	Done
Item	ACRG2000 ->	6009980532100 - Virgin Coconut oil 200ml	PD			4	4	☒

4) Correcting a line: change Use Qty and save; the earlier movement is reversed and the new quantity drawn. Untick Done and the stock goes back into the store.

5) Decide what the customer sees. "Print all additional lines" is ticked by default: every line goes onto the Sage order, invoice and delivery note at its own price. Untick it and the added lines are internal: costed to the job, never shown or charged to the customer. The choice can be changed until the order is updated to Sage.

Job Card Summary*	Service Item 1	Qty Of Items* 1
☐ Print all additional lines Lines added on this job card are internal: costed to the job, not shown to the customer.		

6) Print the job card for the floor with Print Preview. It shows the summary line first, then the materials, with quantities only. No prices appear on a job card.



Job Card # **JC0000068**

Customer: Expo Demo

Sales Rep: Fred Brown

Due Date: 31 Oct 2026

Delivery:

Job Card Note:-	Packing Notes:-	Delivery Notes:-
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Code	Description	Unit	Store	Qty	Use Qty	Complete
Serv Item1	Service Item 1			1.00		
AORG100	6009880532100 - Virgin Coconut oil 200ml		FG	4.00	4.00	

Next document → Job Cards 4 - Closing Off a Job Card