

Knowledge Base



Introduction

Job actions are available for users to be able to record different actions against any active job. Each Job Action has its own icon to make it easy to tell at a glance what each does.

Job Actions ▾

Edit

Quote

Deposits

Invoice

Sales Order

Schedule

Purchase

Reserve

Pick

Consume

Deliver

Job Profit

Cost Flow

Clone Items

Complete

Job Actions can be accessed in two ways:

- From the Job Actions button on the [Job List Page](#):

Jobs

Help Feedback

Customer Jobs

DraftQuotedApprovedAll OpenCompletedRejectedAlt

Search

AddImport JobsRefreshTable Options

Show jobs with these tags...

Do not show jobs with these tags...

Job reference	Customer	Job Title	Customer Reference	Job Contact Name	Job Contact Number	Preferred Start Date	Quoted Amount	Invoiced Amount	Deposit Amount	Last Update
J01669	Quintuple A Enterprises	-	-	Glen Gearwood	412341234	13 Jun 2024	1,511.75	Not Invoiced	No deposits	15 Nov 2024 08:37
J01656	Quintuple A Enterprises	-	-	Glen Gearwood	412341234	06 May 2024	78.80	Not Invoiced	No deposits	15 Nov 2024 08:37
J01655	Quintuple A Enterprises	-	-	Glen Gearwood	412341234	06 May 2024	Not Quoted	Not Invoiced	No deposits	15 Nov 2024 08:37
J01798	AB Acme-Brotherfort Co	-	-	Daniel Craig	341341	05 Sep 2024	516,295.59	Not Invoiced	No deposits	15 Nov 2024 08:35
J01822	World of Water	-	-	-	-	02 Oct 2024	Not Quoted	Not Invoiced	No deposits	15 Nov 2024 08:34
J01624	Jim's Mowing (Est. 1829)	-	-	abc 123	-	02 Feb 2024	Not Quoted	12.00	No deposits	15 Nov 2024 08:33
J01617	108 Markets Inc	-	-	-	-	29 Jan 2024	Not Quoted	1,342.00	No deposits	15 Nov 2024 08:33
J01608	Jim Bob Co	-	-	Jim Bob 10	312345	10 Dec 2023	Not Quoted	Not Invoiced	No deposits	15 Nov 2024 08:33

Edit

Estimate

Deposits

Invoice

Schedule

Purchase

Reserve

Pick

Consume

Deliver

Job Profit

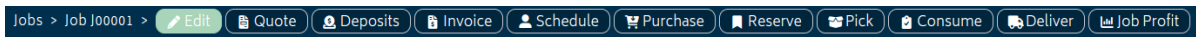
Cost Flow

Clone Items

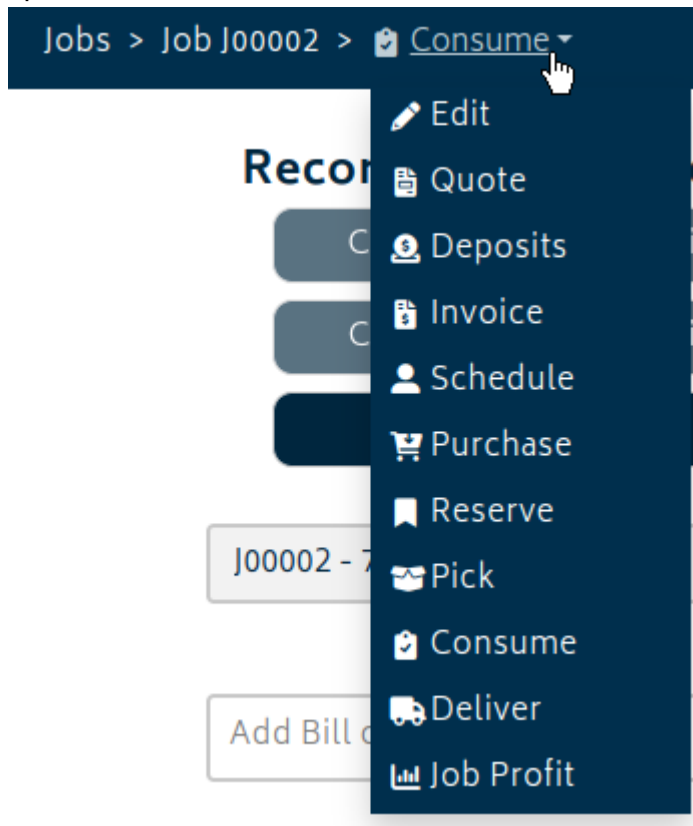
Complete

Job Actions ▾

- Or from the navigation “Breadcrumb” section from within a job at the top of the page:



For mobile or narrow screens, the breadcrumb Job Action section will become a dropdown to save space:



> Edit

Note: If a user navigates away from the job page without clicking “Save” no change will be saved. It is important for users to hit “Save” before navigating away from the job page.

Editing jobs allow users to update / change the job after it has been created.

Clicking “Edit Job” navigates customers to the job creation page:

Create new Customer Job

All amounts shown are tax exclusive

Gross Markup %:

Total Job Price: \$0.00

Gross Margin %:

Total Job Cost: \$0.00

Total Discount Included: \$0.00

Gross Profit: \$0.00

Job Settings

Customer

Job Details

Bill of Materials

Comments


General Information

Reference Number

Customer PO/Ref No.

Job Title

Charge Type

Do and Charge (Time and Materials) 

Sales Person

☐ Approve for Purchasing

Tracking

Region

Tags

Issue Quote

Save

Exit

Refer to the [Create a Job](#) section for more information on the job fields.

When editing a job, all parts of the job can be updated in most cases, with some exceptions – such as if the job BOM is in the “frozen” state (i.e. when a quote is approved). Refer to [the BOM section of the Create a Job](#) page for more information on job freezing.

> Quote/Estimate

From this page within the job, you can create and send quotes to your customers for this job. You can also view all the quotes / estimates that exist for the job. Refer to [Quotes and Estimates](#) for more information.

> Deposits

You can take a prepayment against any job in the system if your business requires. Refer to [Deposits and Payments](#) for more information.

> Invoice

This option allows you to create, view and manage all invoices against a particular job. You can also email the invoices out to the customer. Clicking invoices will display all created invoices for a job as below:

Jobs > Job J00004 > Invoices Feedback

Invoices - Bayside Club - J00004 Email Invoice Create Invoice from Quote New Invoice

Xero Invoice No.	Invoice Ref.	Status	Total	Paid	Amount Due	Due Date	Sent
ORC1050	3 - Job: J00004	Invoiced	\$233.20	\$80.00	\$233.20	12 Apr 2024	No
ORC1048	2 - Job: J00004	Paid	\$250.80	\$250.80	\$250.80	12 Apr 2024	No
ORC1047	1 - Job: J00004	Paid	\$106.70	\$106.70	\$106.70	12 Apr 2024	No

Total Amount Due: \$153.2

There are two standard methods for creating invoices.

New Invoice: This allows you to create a new invoice for a job. Refer to [Invoicing](#) section for more information.

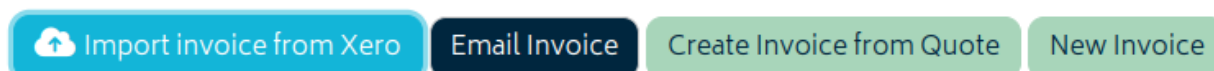
- By default, an invoice created this way will contain the quantities of items that have been consumed via Record Consumables.
- It will refer to previous invoices to ensure that it is only invoicing item quantities that have changed since previous invoices.
- Note that invoices cannot have items with 0 quantity, so you must remove any 0-quantity items from the invoice.

Create Invoice from a Quote: This option allows you to create an invoice by copying all the information on a Quote/Estimate already created for a job. To learn more about Creating Quotes / Estimate refer to the [Quotes and Estimates](#) section.

- Using Create Invoice from a Quote replicates the invoice details based off your Quote/Estimate itself.
- If you hid any item's price or quantity, or removed line items altogether, those will follow the structure of the quote. They won't be displayed on the invoice.

Other methods of creating invoices can be enabled via Organisation Setup > Organisation Add-Ons. Please read [the pages on Add-Ons](#) for more information. These include:

Import Existing Invoice from Xero: If you have alternative workflows for invoices or have a job that was in progress prior to Gojee and you wish to import its paid/approved invoices, this allows you to import an already existing invoice for your job.



Create Retention or Progress Invoices: If your company uses progress claims, you can invoice a percentage of the final result or invoice from the retention amount. These will replace the standard invoice buttons for the job.

Email Invoice

Progress Invoice

Retention Invoice

> Schedule

Allows you to schedule you staff members onto a particular job and record their timesheets against the job. You will need to have professions set on the job in order to use this. Refer to [Scheduling](#) for more information.

Note: In order to schedule a staff member onto a job, you must have the professions set up in Gojee.

> Purchase

This action allows users to raise Purchase Orders for the items required specifically for a job from Gojee.

Purchase Orders - Bayside Club - J00002

ActiveAll

Search

Email PONew Order

Document	Currency	Total (Tax Exclusive)	Supplier	PO Number	Date Issued	Expected Order Delivery Date	Shipment Status	Bill Status	Status	Sent	Raised By	Approved By	Received By	Items	
J00002	AUD	14.00	Building Supplies Limited 80052a	PO-0017	04 Jul 2024	05 Jul 2024	Partially delivered	Not billed	Approved		Paul C	Paul C	Paul C	(1) IS003	Order Actions
Stock Purchase Order + J00002 - PO-NO-FA6DBCE0	AUD	4,608.00	Local Hardware 2a5fc3	PO-0014	03 Jul 2024	06 Jul 2024	Delivered	Fully billed	Approved		Paul C	Paul C	Paul C	(1)	Order Actions
J00002	AUD	108.00	ABPA	PO-0016	04 Jul 2024	11 Jul 2024	Awaiting shipment	Not billed	Approved		Paul C	Paul C	-	(2)	Order Actions

Using the “New Order” button will take you through to the PO creation screen and pull in all items for the job that are not already on order, reserved, or consumed onto the job. If suppliers have already been chosen through the BOM, raising a PO for that job via the Purchasing job action will use the chosen suppliers for that job.

Refer to the [Job Stock Orders](#) section for more information on the process of raising purchase orders.

POs can be sent directly to a supplier from Gojee via email. This can be done with either the “Order Actions” dropdown for a specific PO, or the “Email PO” button next to the New Order button.

Please select a purchase order to email



Stock Purchase Order + J00002 - PO-NO-EA6DBCE0 - PO-0014



To

Jim Smith (info@localhardware.com) x



Subject

Purchase Order PO-0014 from Very Cool Demo Company (AU) 2024/07/02 for Local Hardware...

Body

Hi Jim Smith,

Here's purchase order PO-0014 for AUD 4608.00.

Delivery due date, address and instructions are included in the purchase order.

If you have any questions, please let us know.

Thanks,

Very Cool Demo Company (AU) 2024/07/02

- ☒ Send bcc (blind carbon copy) to organisation email
- ☒ Include purchase order as attachment
- ☒ Include all additional attachments from PO Attachments tab

Send Email

Cancel

POs listed here can be edited if clicked, and attachments can be added to be sent to a supplier. If a PO has attachments, it will be noted as such with the green attachment icon.

Purchase order

Attachments

Edit history

Edit Purchase Order

Supplier

Building Supplies Limited 278...

Currency

AUD

Note: There is a rough limit of 15-20mb of total attachments that can be sent in an email, due to the nature of email as a medium. More can be added to the PO after it is sent (for storage, as memos and records etc) but it is generally a good idea to not add more than 15mb total of attachments if they are to be sent with a PO.

> Reserve

Reservations allow you to reserve stock on hand for jobs. This means that these stock items will stay in stock, and on hand, but they won't be available for other jobs to consume or reserve. This section allows you to view and manage reservations for all items on a job.

Jobs > Job JOB-123 >

Edit

Quote

Deposits

Invoice

Schedule

Purchase

Reserve

Pick

Consume

Deliver

Job Profit

Cost Flow

Help

Feedback

Reservations

Search

New Reservation

Item Code	Name	Reserved Quantity	Fulfilled Quantity	Reserved Location	Reserved Items	Reserved By	Reserved Date ^	Fulfilled	
IS012	Safety Helmet	5	0	-	Item On Order	Jim Jobson	24 Oct 2024, 14:48	No	<div>Delete</div>
IS004	Call Out Fee	10	0	-	Item On Order	Jim Jobson	24 Oct 2024, 13:24	No	<div>Delete</div>
b8890770-4cab-40fd-ac2f-182703e35f5f	Pipe Flange 1/2"	10	0	-	Item On Order	Jim Jobson	24 Oct 2024, 13:24	No	<div>Delete</div>
A-ZVI-SQTMDD1-S	<div>TMD1 Button Temp pro...</div>	3	0	WH1	<div>Location</div> QuantitySerial Number	Jim Jobson	24 Oct 2024, 13:15	No	<div>Delete</div>
					WH13foobar2				
IS018	Circular Saw	3	0	WH1	<div>Location</div> QuantitySerial Number	Bob Dobson	12 Apr 2024, 08:39	No	<div>Delete</div>
					WH11356				
					WH11323				
					WH11345				
A-ZVI-SQTMDD1-S	<div>TMD1 Button Temp pro...</div>	2	0	WH1	<div>Location</div> QuantitySerial Number	Franz Ferguson	12 Apr 2024, 08:39	No	<div>Delete</div>
					WH12foobar2				

There are 4 main ways to create reservations for items:

- Reserve all available items from the BOM
 - This will reserve all items from stock that are not already earmarked for a job.
- Create [Purchase Orders](#) for the job
 - Reservations will automatically be created for these items.
 - If they are not automatically consumed, they can wait at the location they are received with open reservations.

- Create Picking Slips from the Pick job action
 - As items are picked, they will be reserved. Picking allows for more manual control over the item-gathering process.
- Manual reservations via this Reserve page

The reservations list will be blank if no reservations have been made already for the job. In the case where reservations have been made via a purchase order and have not yet been received, the items will show as “on order” as per the image above.

To create a manual reservation, click on the “New Reservation” button at the top right of the page and you will be directed to the following page:

All of the stock items required on the job BOM page will show on this page. Refer to the “Available Items” column for information as to what stock is available to reserve and where. The “Quantity to Reserve” column will default to what’s required for the job if the stock item is available. You can remove the lines that aren’t available to reserve using the (x) icon at the end of the row. Doing this will result in the following information shown on the page:

Be sure to select the location that you are reserving the stock from in the last column (as stock can exist in multiple locations) and then hit the create reservation(s) button. You will be directed back to the reservations list page for the job, showing the reservations that have been made:

Note: Once the items are reserved, you will need to consume them onto the job through the Record Consumables process. See below for details. You can either use the “**Reserved Instances**” option in the location dropdown or the “Consume all reserved items” button:

Once you have consumed the items onto the job from the Record Consumable process, the reservation will be updated as “Fulfilled” as per the image below:

Jobs > Job J00005 > Reservations

Feedback

Reservations

Search

New Reservation

Item Code	Name	Reserved Quantity	Fulfilled Quantity	Reserved Location	Reserved Items	Reserved By	Reserved Date ^	Fulfilled	
IS002	Arlec 9W Tri Colour D...	3	3	WH1	No Item Reserved		28 Sep 2023, 17:29	Yes	Delete

> Pick

Selecting this option allows you to view and manage your picking slips. It will bring you to the picking slip screen, which will list all picking slips for this job and allow you to see the status of each. You can print picking slips to be used for your staff as a list of items to pick from wherever you have your inventory stored, and record each item on a slip as being picked or not.

Jobs > Job J00001 > Picking Slips

Help

Feedback

Picking Slips

Awaiting picking (3)

Partially picked

Picked

Delivered

invoiced (1)

Voided (1)

New Picking Slip

Total Cost: 466.98 Total Price: 657.89

Picking Slip	Status	Total Cost	Total Price	Date Issued ^	
05 Sep 2024, 11:27	Active	80.00	80.00	05 Sep 2024, 11:27	Actions
05 Sep 2024, 11:27	Invoiced	237.60	216.00	05 Sep 2024, 11:27	Actions
05 Sep 2024, 11:02	Active	149.38	361.89	05 Sep 2024, 11:02	Actions

To create a picking slip, click the New Picking Slip button. You will be able to see a list of the items on your job and view them with templates fully expanded, partially expanded to specific depth levels, or flattened.

gojee

Create Picking Slip

(AU) 2024/08/16 - Paul C

Help

Feedback

New Picking Slip

Jobs > Job J00001 > Picking Slips

Total Cost: 0.00 Total Price: 0.00

Picking Slip

View Level

Level 2

Name

Picking Slip Name...

<input type="checkbox"/>	Name	Item code	Unit	Available Qty	Required Qty	Recorded Qty	Quantity Picked	Quantity Left to Pick
<input checked="" type="checkbox"/>	4 Pack Downlights - C...		Each	1				1
<input checked="" type="checkbox"/>	Call Out Fee	IS004	Each	0	1	0	0	1
<input checked="" type="checkbox"/>	Arlec 9W Tri Colo...	IS002	Each	10	12	0	0	12
<input checked="" type="checkbox"/>	Extension Cord	IS015	Each	0	1	0	0	1
<input checked="" type="checkbox"/>	Drill Set	IS013	Each	0	1	0	0	1
<input checked="" type="checkbox"/>	Cordless Drill	IS014	Each	0	1	0	0	1
<input type="checkbox"/>	Call Out Fee	IS004	Each	0	1	0	0	1
<input type="checkbox"/>	Budget Estimate	budget-estimate	Each	0	1	0	0	1
<input type="checkbox"/>	Test item 2	ITEMITEMITEM	Each	0	1	0	0	1
<input checked="" type="checkbox"/>	Safety Helmet	IS012	Each	50	1	0	0	1
<input type="checkbox"/>	Ceiling Fan	IS001	Each	0	2	2	0	2

Create Close

A Picking Slip PDF will be generated for printing, showing all the items for the job along with required and recorded quantity:

Picking Slip

Job Title:		Job Reference: J00003		Customer: Bayside Club			
Item Code	Name	Location	Unit	Available Qty	Qty Required for Job	Total Recorded Qty	Notes
	Computer Equipment		hour		1.0	1.0	
IS003	Reverse Cycle Split System Air Conditioner		each	0.0	1.0		Carrier Allure 7.0kW
IS002	Arlec 9W Tri Colour Dimmable LED Downlights	- WH1 (9.0 items)	each	9.0	1.0	1.0	With Plug Bases

When editing the picking slip, you will be able to change the name and set the status of the picking slip, choose where items have been picked from, and make the reservations for the job. You will also have the option to consume these reserved items directly onto the job.

Jobs > Job J00001 > Picking Slips > Edit Picking Slip

HelpFeedback

05 Sep 2024, 11:02

Set Status

Automatically reserve all items

Consume all reserved items

Total Cost: 149.38 Total Price: 361.89

<input type="checkbox"/> Picked?	Item Code	Name	Type	Unit	Quantity	Reserved	Total Cost	Total Price	Pick Items
<input type="checkbox"/>	IS004	Call Out Fee		Each	1.0000	-	80.00	59.13	
<input type="checkbox"/>	IS015	Extension Cord		Each	1.0000	0	4.00	22.95	Select Location
<input type="checkbox"/>	IS013	Drill Set		Each	1.0000	0	4.00	24.95	Select Location
<input type="checkbox"/>	IS014	Cordless Drill		Each	1.0000	0	12.50	129.00	Select Location
<input checked="" type="checkbox"/>	IS012	Safety Helmet		Each	1.0000	1	4.00	14.99	WH1 - (50) item(s) in this... 1
Reserve									
<input type="checkbox"/>	IS002	Arlec 9W Tri Colour Dimmable LED Downlights		Each	12.0000	0	44.88	110.87	Select Location
WH1 - (10) item(s) in this location									

Save

Void

Exit

> Consume

This option allows you to record your stock items against a job and return excess back to stock, or record the usage time of fixed assets. You can record individual quantities, consume all items at once, or consume items reserved through the BOM. Alternatively, when receiving a purchase order made for a job, Gojee will automatically record the required quantity for a job if the “Automated Consumption” checkbox is ticked on the Goods Receipt page. Refer to [Purchasing](#) for more information.

Record Consumables

Consume all reserved items

Consume all available items

Print Picking Slip

J00004 - Bayside Club

Add Bill of Material... ▾

Full Detail ▾

Consume

Return

Name	Item code	Description	Type	UOM	Available Qty	Quantity	Recorded quantity	Qty to Consume
Hardwood Planks (Leng...	ISM-P	Birch		meter	39 (39)	4	0	<div>Instance Location</div> <div>WH1 - (39) item(s) in this ... ▾</div> <div>Enter consumption quantity</div>
Circular Saw	IS018	15Amp Circular Saw		each	4 (4)	1	0	<div>Instance Location</div> <div>WH1 - (4) item(s) in this l... ▾</div> <div>Select Instance ▾</div> <div> <div>645 (1)</div> <div>435 (1)</div> <div>324 (1)</div> <div>234 (1)</div> </div> <div>Serial Available Consuming</div>
Ceiling Fan	IS001	Arlec 120cm White Chicago 4 Blade With light AC		each	7 (7)	2	0	
4 Pack Downlights				each	-	3	-	<div>Instance Location</div>

To consume an item on a job:

For each item, its name, item code, type, unit of measure, and quantities will be shown and you will be able to choose how many to consume (and from where).

Consume all reserved items

Consume all available items

Print Picking Slip

▾

Full Detail ▾

Consume

Return

Type UOM Available Qty ⓘ Quantity Recorded quantity Qty to Consume

The items in the image above are explained below:

- **Consume all reserved items:** Consumes all instances of items reserved from the BOM.
- **Consume all available items:** Automatically consume everything possible from item stock.
- **Consume/Return tiles:** Indicates whether you are consuming or returning an item.
- **Full Detail/Flat dropdown:** Choose whether to nest templates or list all items on one level.

The categories are as follows:

- **Unit of Measure:** Indicates whether an item must be recorded in wholes or can be recorded in partials.
- **Available Qty:** Shows how many of the item are available for use.
- **Quantity:** The quantity required for this job.
- **Recorded Qty:** Indicates the quantity recorded against this stock item or asset.
- **Qty to Consume:** Shows the consumption total you will have when changes are saved

The fields on the right allow you to pick the correct stock location to consume the items from (and in the case of individually tracked items, which item to consume) or allows you to consume reserved instances onto the job. Location is not required for untracked items.

- To learn more about setting up multiple stock locations, refer to the [Settings](#) section.
- To learn more about stock [reservations](#), refer the section below.

To record an item against a job, select the stock location and enter the quantity that is consumed.

Note: You do not need to consume an item manually if you have raised a purchase order through the [Job Stock Orders](#) function, unless you have chosen to **not** automatically consume the item at the goods receipt stage.

In the case that the consumption is not automatically done, the items ordered for the job will be allocated to stock, and reserved for the job, so the system will not allow them to be consumed onto other jobs. To consume the reserved items onto the job from the record consumables page, simply select “**Reserved Instances**” from the dropdown in the Qty to Consume column (i.e. instead of selecting a location).

To return an item to stock (i.e. reverse the process of consuming it):

You can return an item if the item was consumed by mistake or in the case where a customer cancelled an order after you processed it. To return an item:

1.

1. Go to Job Actions > Record Consumables
2. You will be navigated to the record consumable page

The screenshot shows the 'Record Consumables' page for Job 100003 - Bayside Club. The table contains the following data:

Name	Item code	Description	Type	UOM	Available Qty	Quantity	Recorded quantity	Qty to Consume
Computer Equipment			hour	-		1	1	0.00
Reverse Cycle Split S...	15003	Carrier Allure 7.0kW	each	0 (0)	1	0		Select location Please select a location
Arlec 9W Tri Colour D...	15002	With Plug Bases	each	9 (9)	1	1		WH1 - (9) Item(s) in this location Enter consumption quantity

3. Click Return from the top right menu:

The screenshot shows the 'Record Consumables' page with the 'Return' button circled in red in the top right corner. The table data is the same as the previous screenshot.

4. Enter the quantity against the item that you wish to return (please ensure that you select the correct warehouse if you are using multiple stock locations)

Jobs > Job J00003 > Record Consumables

Record Consumables

J00003 - Bayside Club

Add Bill of Material...

Print Picking Slip

Consume Return

Name	Item code	Description	Type	UOM	Available Qty	Quantity	Recorded quantity	Return
Computer Equipment			hour	-		1	1	0:00
Reverse Cycle Split S...	I5003	Carrier Allure 7.0kW	each	0 (0)		1	0	<div>Return Location</div> <div>WH1</div> <div>Enter return quantity</div>
Artlec #W Tri Colour D...	I5002	With Plug Bases	each	9 (9)		1	1 -> 0	<div>Return Location</div> <div>WH1</div> <div>1</div>

5. Click “return to stock” and stock will be returned to your warehouse.

> Deliver

You can create one or more delivery dockets for a job as it progresses. As you create multiple delivery dockets, the system will track what’s already been shipped, and what’s on back order.

To create a delivery docket:

- Go to Job Actions > Delivery Dockets

Jobs > Job J00004 > Delivery Dockets

Feedback

Delivery Dockets - Bayside Club - J00004



New Delivery Docket

Document	Invoice Number	Reference	Raised By	Date Created
Exit				

- Click on “New Delivery Dockets” from the top right menu and you will be directed to the Delivery Dockets creation page:


New Delivery Docket

Date	Invoice Number	Reference
<input type="text" value="04/12/2024"/> 	<input type="text" value="Please select..."/> 	<input type="text" value="J00004 -"/> <input type="text"/>

Item Code	Name	Unit	Qty Ordered	Qty Shipped	Qty B. O	
ISM-P	Hardwood Planks (Lengths)	Meter	4	<input type="text" value="4"/>	0.00	
IS018	Circular Saw	Each	1	<input type="text" value="1"/>	0.00	

Line Items Not Included

Item Code	Name	Unit	
IS001	Ceiling Fan	Each	
IS002	Arlec 9W Tri Colour Dimmable LED Downlights	Each	

Invoice To	Deliver To 	Instruction
<input type="text" value="Bob Partridge"/>	Same as Invoice To	<input type="text"/>
Postal Address		

The line items will be shown based on your [bill of materials](#) for the job. You can remove any items you don't wish to display on the docket, such as if you prefer to hide items with a quantity of 0.

- The Qty Ordered amount is what is required for the job from the BOM page.
- The Qty Shipped amount will default to what items have been consumed onto the job, **that are not yet delivered**. This field will set the qty shipped amount for this delivery docket.
- Qty B.O. is the quantity on back order. Its the difference between what's required for the job, and what's being shipped in this delivery docket, or has already been shipped.
- The Invoice To field will default to the customer details for the job.
- The Deliver To field will default to the site address as set on the job settings tab, however you can edit it as required.

After making the required changes, Click "Create Delivery Docket" at the bottom left of the screen:

Postcode

Postcode

Country

Country

Create Delivery Docket

Cancel

A PDF document will be generated that you can print and post onto your deliveries.

1 / 1

109%

Delivery Docket

Invoice To:
Bayside Club
P O Box 3354
South Mailing Centre
Ridge Heights, Madeupville, MVL 6001
Australia

Delivery To:
Bob Partridge
P O Box 3354
South Mailing Centre
Ridge Heights, Madeupville, MVL 6001
Australia

Invoice Date:
2024-04-12
Invoice Number:
J00004-
Reference:
J00004-
Customer PO/Ref No:

From:
Demo Company (AU) 2024/4/10
23 Main Street
Marineville, NSW, 2000

Item Code	Description	Qty Ordered	Qty Shipped	Qty B.O
ISM-P	Hardwood Planks (Lengths)	4.00 meter	4.00 meter	0.00 meter
IS018	Circular Saw	1.00 each	1.00 each	0.00 each

Received by
Signature
Date

page 1

> Job Profit

The Job Review page lets you look at your job's progress in real time, and compare the budgeted costs and revenue to actuals.

The cost budget and quantities come from an approved quote – if there is no quote, it comes from the BOM.

Jobs > Job J00002 > Review Job

Review Job

J00002 - City Limousines

Job Type: Do and Charge

All figures are tax-exclusive, shown in currency: AUD

Cost by Resource Group

Revenue by Resource Group

Forecast Variance to Budget: 0.00

Estimated	4,628.40	528.00	18.75
Actual	4,710.00	467.51	0.00
Remaining	(-81.60)	60.49	18.75
Actual %	101.76%	88.54%	0.00%

Estimated	5,024.21	657.60	150.00	5,831.81
Earned	5,721.03	582.62	0.00	6,303.65
Invoiced				6,081.84
Remaining				221.81

	Budget	Actual	Remaining	Actual %
Revenue	5,831.81	6,081.84	(-250.03)	104.29%
Costs	5,175.15	5,177.51	(-2.36)	100.05%
Gross Profit	656.66	904.33	(-247.67)	137.72%
Gross Markup	12.69%	17.47%		4.78%

Search table

Item Code	Name	Type	UoM	Budget Qty	Used Qty	Cost Budget	Committed Costs	Incurred Costs	Remaining Budget	Forecast Completion Cost	Forecast Final Cost	Forecast Variance to Budget
	Work Van		hour	0.75	0	18.75	0.00	0.00	18.75		-	-
	Air Cond. Technician		hour	8	8.67	448.00	0.00	467.51	(-19.51)		-	-
	Electrician		hour	1	0	80.00	0.00	0.00	80.00		-	-
IS004	Call Out Fee		each	1	0	0.00	0.00	0.00	0.00		-	-
IS005	Magic Lamp		each	1	5	20.40	0.00	102.00	(-81.60)		-	-
IS003	Reverse Cycle Sol...		each	3	3	4,608.00	0.00	4,608.00	0.00		-	-

Above the item table is a summary of the budget for each category of items and the job as a whole. If only one type of item is included on the job, the cost and revenue by resource group summaries will not be shown.

The table's headings are explained below:

- **Item Code:** Unique identifier for each item.
- **Name:** The name of the item used.
- **Type:** Indicates whether the item is inventory, an asset, a template, or a profession.
- **UoM:** The unit of measure.
- **Budget Qty:** The quantity of the item indicated while creating the quote/estimate for this job and estimated to be required.
- **Used Qty:** Indicates what item qty has been recorded against this particular job.

Note: If the Automated Consumption tickbox is selected when receiving the goods ordered, any inventory purchases made for a job will automatically be consumed for a job and have the costs allocated on the job review page once the item has been received. Refer to the [Purchasing](#) section for more information.

For existing stocked inventory and assets, you will need to manually consume these costs against the job. Refer to the [Record Consumables](#) section below for more information.

For professions, your employees or a manager must record time against the profession for a particular job for the costs to show on the job review page. Refer to this section for more information [Time Tracking](#).

- **Cost Budget:** The estimated total cost for a particular line item, driven off information entered onto the BOM page (refer to the [Create Job](#) page for more information).
- **Committed Cost:** Costs for this item from Purchase Orders raised for a job, but not yet incurred onto the job.
- **Incurred Cost:** indicates the amount of items that have already been consumed for a job.
- **Remaining Budget:** indicates the remaining budget after subtracting Committed + Incurred Cost.
- **Forecast Completion Cost:** is a manual entry for users to insert a forecasted completion cost on a job or project to track Forecast final cost as well as Forecast Variance to Budget.
- **Forecast Final Cost:** A sum of the committed cost, actual cost and forecast completion cost.

- **Forecast Variance to Budget:** Calculated by subtracting the forecast final cost from the cost budget.

The View/Adjust Records button allows for stock and asset items to be consumed onto a job. It takes you to the Record Consumables page for that job.

Addendum

Other things that are not always in the Job Actions list:

- **Sales Order:** This appears if a Sales Order is present for the job. It is a quick shortcut to the sales order for this job.
 - **Cost Flow:** This appears if the Cost Adjustment add-on is enabled. It allows for longer-term jobs to expense consumed inventory items when needed to keep the account books balanced.
 - **Clone Items:** This only appears from the Job List. This clones the BOM to a new job so that the job may be duplicated for another customer, or the job may be performed again.
 - **Complete/Reactivate:** This only appears from the Job List. This will mark the job as completed or not.
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Next: [Tags](#).