



## Job Cards

*A guide to creating, issuing, and tracking Job Cards from Sales Order through to completion*

### Introduction

A Job Card is the production document that drives manufacturing and stock issuing against a Sales Order. It is created directly from a Sales Order, carries across the order's lines, and lets you build finished goods from Kits and Bundles, issue raw materials and services, hand work between departments, and track the whole job from start to finish on a visual status board.

This guide covers the Job Card screen itself and the tools used to track Job Cards through their workflow. It does not cover how Kits and Bundles are defined — see the separate guide on setting up Kits and Bundles for that.

**⚠ Important:** Job Cards are part of "Module 2" (Sales Forecasting and Job Cards). This must be switched on for your company before the Job Card options appear — contact Data Fusion support if you need it turned on.



## Before You Begin — Prerequisites

- Module 2 (Sales Forecasting and Job Cards) must be active for your company — this is a company-wide setting, so ask Data Fusion support to enable it if you don't see Job Card options.
- Your user role needs permission to view and work Job Cards, and to use the Job Card Tracking board — set up by your administrator.
- A Sales Order must already exist. A Job Card is always created from a Sales Order and shares its customer, due date, reference and sales rep details.
- Any Kits or Bundles you plan to build must already be set up with their component recipe elsewhere in the system — this guide only covers using them on a Job Card, not defining them.
- Your company's workflow stages ("Job Card Processes", e.g. Captured → Cutting → Assembly → QC → Complete) should be configured in advance, so a Job Card has stages to move through.

## Key Terms — Glossary

| Term                               | What It Means                                                                                                                                            |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Card</b>                    | The production/execution document created from a Sales Order. It lists what needs to be built or issued, and tracks progress until the work is complete. |
| <b>Job Card Line</b>               | One row on the Job Card — an item, service, GL account entry, Kit or Bundle to be issued or consumed.                                                    |
| <b>Workstation / Process Stage</b> | A configured step in your production workflow (for example Cutting, Assembly, QC). Job Cards move between these stages as work progresses.               |
| <b>Issue</b>                       | Formally handing the Job Card over to start work — moves it to a chosen department/stage and stamps the Issue Date.                                      |
| <b>Done</b>                        | Marking a line as complete. Saving a line ticked Done issues that quantity out of the chosen store, at that store's current cost.                        |
| <b>Process Trail</b>               | The move-by-move history of a Job Card — every stage change, issue, and close-off, with date and time.                                                   |
| <b>Job Card Tracking board</b>     | The visual board showing every open Job Card grouped by its current stage, with drag-and-drop to move cards along.                                       |



## Where This Happens

| Screen                             | Purpose                                                                                                                                       |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Order                        | Where a Job Card is created from — choose "Create Job Card" from the order's create options.                                                  |
| Job Card                           | Build and issue the Job Card's lines, add messages, print, and close off the job.                                                             |
| Job Card Tracking                  | Drag-and-drop board for moving Job Cards between workflow stages, with search and a due-date filter.                                          |
| Job Card Tracking (wallboard view) | A read-only version of the board that auto-refreshes on its own — designed for a shop-floor display screen.                                   |
| Job Process History                | The full audit trail for one Job Card — every move, with approved and rejected quantities. Opened from the Job Card's "Process Trail" button. |

## The Full Workflow

1. Create the Job Card from a Sales Order. On the Sales Order screen, choose "Create Job Card" from the order's create options. Give it a reference number, or use "Auto-create a Number" to generate one from the Sales Order number. Every line on the Sales Order is copied onto the new Job Card — including ordinary items, services and GL account lines, not just Kits and Bundles.
2. Let Kit-built items explode automatically. If a copied line is a finished item built from a Kit recipe, it is automatically expanded into a summary line plus one line per component, at the correct quantities for the order — you don't need to do this by hand.
3. Add or adjust lines as needed. On the Job Card grid, add a line by choosing its Type (Item, Service, GL Account, Flexi-Kit or Bundle), then the specific item/kit/bundle, the Store it's issued from, and the quantity. Scanning a barcode into the Barcode column will look the item up and fill in the rest.
4. Use "Create from Kit" or "Assemble from Bundle" for extra builds. Choosing Type Flexi-Kit or Bundle on a line opens a popup asking how many Kits or Bundles are needed — confirming it adds a summary line plus one line for every component, at the right quantities, automatically.
5. Issue the Job Card. Click the + button next to "Issued To". Choose the Department to route the card to and click Issue. This moves the card to that stage and records the Issue Date.
6. Work the lines. As raw materials, kit components, or bundle components are physically issued, tick each line's Done checkbox and save it. This posts the stock movement out of the chosen store immediately.
7. Track progress on the board. Use Job Card Tracking to drag cards between stages as the job moves through your workflow, entering the approved quantity and any rejects when a card is dropped onto a new stage.
8. Close off the Job Card. Once every line is marked Done, click "Close off Job Card As Complete." This moves the card to the final workflow stage, marks the linked Sales Order complete, and locks the Job Card from further editing.



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## Understanding What Gets Issued

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A Job Card is not limited to Kits and Bundles. Ordinary physical items can be added to a Job Card line and issued from a store in exactly the same way as a kit component — pick Type "Item". Choose the item and store, enter the quantity, tick Done, and save. This makes the Job Card the place to issue raw materials to a job as well as to assemble finished goods.

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## Understanding Kits and Bundles on a Job Card

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"Create from Kit" and "Assemble from Bundle" both work the same way: you tell it how many units to build, and it adds a summary line for the finished item plus one line for every component at the matching quantity. Only the component lines carry a Store, Lot #, barcode and Done checkbox for picking — the summary line is just a roll-up label.

**Note:** Once a Kit or Bundle line has been saved and the Job Card is reopened, its Type may display back as "Item" rather than "Flexi-Kit"/"Bundle". You can still identify these lines from their description, which is tagged with the Kit or Bundle code (for example "(Flexi-Kit RT-001)").

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## Understanding the Job Card Tracking Board

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The Job Card Tracking board shows one column per active workflow stage (your final "Complete" stage is not shown as a column, since cards leave the board once closed off). Each open Job Card appears as a card you can drag between columns. Dropping a card on a new stage asks for the approved quantity and any rejects, then records the move and updates the card's status. A search box lets you find a card by customer, Job Card number or Sales Order number, and a due-date filter narrows the board to jobs due on or before a chosen date. Clicking a card's job number opens that Job Card directly.

A separate, read-only version of the board is available for display on a shop-floor screen. It shows the same columns and cards but has no drag-and-drop, search or filter, and refreshes itself automatically every few seconds.

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## Understanding the Process Trail

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Every workflow move — issuing the card, dragging it on the tracking board, or closing it off — is logged. On the Job Card screen itself, the "Process Trail" panel gives you a simple date-and-stage list. Clicking the Process Trail button opens the full Job Process History for that card, which adds the approved and rejected quantities recorded at each move, for a complete audit trail.



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## Common Mistakes to Avoid

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- **Trying to close off before every line is done.** "Close off Job Card As Complete" is blocked until every visible line's Done checkbox is ticked.
- **Not seeing Job Card options at all.** This means Module 2 isn't active for your company, or your role doesn't have permission — check with Data Fusion support and your administrator.
- **Editing a Job Card after its Sales Order is already complete.** Once the linked order is complete, the Delete, Save Edits and Close-off buttons disappear and the line grid becomes read-only.
- **Deleting a Job Card that already has issued lines.** Deleting reverses any stock already issued back into store and re-opens the linked Sales Order — only do this if you actually intend to undo the work.
- **Looking for a Kit/Bundle line by its Type after reopening the card.** Use the item description instead, which carries the Kit or Bundle code.