

Manage Quantity on Job

Manage Quantity on Job

You can automatically manage quote lines by enabling the **Manage Qty on Job** option.

- On the quote header, go to the **Extras** tab
- Tick **Manage Qty on Job**

This ensures that all lines added to the quote are automatically marked for **managed quantity on the job**.

Updating Existing Quotes

The **lightning bolt button** can be used to update older quotes, or quotes where the option was not selected when first created.

- Clicking this button will update all existing lines on the quote
- All lines will then have **Manage Qty on Job** applied

Default Behaviour

- By default, this option is **unticked**
- This is because quotes are not always managed directly to a job, as their primary purpose is to **prepare and budget work before job execution**

Quote

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote Detail Address **Extras** Link Shipping Action Docs Cust

Job No.: JOB1083 Assign JN Long Description:

Completion Date: 2026-05-25

Asset Item:

Debtor Status:

Assembly: Print Custom Fields: Manage Qty On Job: Exclude From Reports:

Charge Up (SC): Prepriced (CTC):

Sales Lead: Probability: 0%

Sales Lead Follow Up Date:

Save Close Print Quote Job Card Service Card T & Cs

Items

Page 0 of 0 Paging Add Note Edit Delete Quick Add Dimension Show/Hide

#	Line Ref.	Seq. No.	LS	Status	Type	Code	Description	Qty	Pricing level	Sales Rep

Footer

Promotion Value: 0.0000 Clear Discount

Discount %: 0 Amt: 0.00

Service Month: May

Internal Contact: Pamela Dean

Pricing Analysis

Margin % 0.0000

Mark-up %

Cost Ex GST

Profit

Total Selling

Sub Total 0.00

Less Discount 0.00

Ex GST 0.00

GST 0.00

Inc GST 0.00

Deposit 0.00

Once lines are entered, the **Manage Quantity on Job** option will be automatically selected for each line.

Add Quote Item

QTY: 2

✕

Quote Item

Inventory Overview

View Image

Special Item

Functions

Currency: NZD - NZ Dollar

Category: Stock

✕ Close

Details

Notes

UOM

Build kit

Specs

Stock Item:

CPU/1151/I3/7100 - Intel CPU i3 7100K - 3.9Ghz Socket 1151

Tasks:

☐

Description:

Intel CPU i3 7100K - 3.9Ghz Socket 1151

Item Group:

☐

Manage Qty On Job:

☒

Points:

0

Qty:

1

Warehouse:

MAST - Master Warehouse

Pricing Structure:

Default

UOM Type:

Selling Ex GST:

195

UOM:

EA - Each

Selling Inc GST:

☐

224.25

Line Discount:

10

175.50

Sub Total Selling:

175.50

GST Type:

01 Invoice GST:15

GST Value:

26.33

Total Selling:

201.83

Line Reference:

Sequence No:

1

Promotion:

☐

Zero Cost On Job:

☐

Zero Cost On Invoice:

☐

Show In Print:

☒

Flag for Report:

☐

Build Selection:

Weight Per Unit:

0

T/W:

0.00

Division:

Sales Rep:

Dealer

Region:

Project:

Days from Start:

Employee Assigned:

Lead Time:

Order Date:

2026-06-04

Reminder Date:

2026-06-04

Reminder

Required Date:

2026-06-04

Creditors:

DEF Company

Add

Drop Ship:

☐

RFQ:

☐

PO Qty:

Internal Note:

Qty On Sales Orders:

6

Detail

Qty on SO Confirm / WHS:

Detail

Save & New

Save & Close

✕ Close

Update Cost

There is a **column indicator** that shows whether the **Manage Quantity on Job** option is selected for each line

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote

Quote Detail Address Extras Link Shipping Action Docs Cust

Job No.: JOB1083 Assign JN Long Description:

Completion Date: 2026-05-25

Asset Item:

Debtor Status:

Assembly: ☐ ☐ Print Custom Fields: ☒ ☐ ☐ ☐ Quote Total Description ☒ Quote Estimate

Charge Up (SC): ☐ ☐ Manage Qty On Job: ☒ ☐ Sales Lead: Probability: 0%

Prepriced (CTC): ☐ ☐ Exclude From Reports: ☐ ☐ Sales Lead Follow Up Date:

Save Close Print Quote Job Card Service Card T & Cs

Items

Page 1 of 1 Add Note Edit Delete Quick Add Dimension Show/Hide

#	Line Ref.	Seq. No.	LS	Status	Type	Manage Qty On Job	Code	Description	Qty	Pricing level	Sales Rep	UOM
1		1		\$	Stock	Yes	CPU/1151/I3/7...	Intel CPU i3 71...	1	Default	DEALER	Each

Footer

Promotion Value: 0.0000 Clear Discount

Discount %: 0 Amt: 0.00

Service Month: May

Internal Contact: Pamela Dean

Pricing Analysis		Total	Selling
Margin %	14.5299	Sub Total	175.50
Mark-up %		Less Discount	0.00
Cost Ex GST		Ex GST	175.50
Profit		GST	26.33
		Inc GST	201.83
		Deposit	0.00

Job lines are processed once they have been **managed**, marked as **Is Complete**, and their status updated to **Complete**

Rule

- If there is **insufficient stock available**, the line cannot be managed
- This includes situations where stock exists but **is not enough to fully cover the required quantity**

In these cases, the line will remain **unmanaged on the job** until sufficient stock is available

Manage Job

Search

Memo

Attachments

Create Reminder

Info

Workflow

Ready For Invoice

Functions

View Doc

Print Doc

Print

Print Reports

Save

Close

JOB1083

Started

The Crossing

Days to Completion: -24

All Job Lines

Stock

Service

Custom

Tasks

Basic

Filter

Functions

Date Details

Address

Shipping / Link

Progress

Custom

JOB1083

CROSSING

QT316

Short Description: Toone - Concertina Louvre (792

Team:

Completed: 3%

0%

☒

Reference: 7928

Alerts

Charge Up (SC): ☒

Assembly: ☐

Order No: MG260501

Prepriced (CTC): ☐

Internal Job: ☐

Sales Rep: DEALER

Sub Job Link:

Status/Position:

Comment:

Asset Item:

L: ☒

Manage

Sales Docs

Purchase Docs

Scheduling

Job Lines

Planned Time

Job Line History

Sub Job Link

BOM Links

Notes

Page 1 of 1

Remove Paging: ☐ 1

Manage line

A Cost To Company

B Scope Creep

C Quote

2 Job Detail

3 Line History

Inventory Overview

#	To Inv	Notes	Line Type	QT No	Job Line Item Description	B-Status	Budget Qty	Actual	Balance	Line Status	Unit Sell	Employee	Days Req
1			Quote	QT316.01	Intel CPU i3 7100K - 3.9G...		1	1	0	Complete	195.00		
2			Quote	QT316	Rain Sensor		1	0	1	Not Started	520.00		-31
3			Quote	QT316	Concertina V2 - Extrusion ...		1	0	1	Not Started	549.90		-31
4			Quote	QT316	Concertina V2 - Extrusion ...		1	0	1	Not Started	630.50		-31
5			Quote	QT316	Concertina V2 - Extrusion ...		1	0	1	Not Started	665.60		-31
6			Quote	QT316	Concertina V2 - Extrusion ...		1	0	1	Not Started	982.80		-31
7			Quote	QT316	Manufacture and Install A...		1	0	1	Not Started	5 000.00		-31
8			CTC		Concertina Louvre Product...		1	0	1	Not Started	0.00	Malcolm Granville	-31

Revision #2

Created 24 June 2026 22:33:16 by Pamela

Updated 28 June 2026 22:27:37 by Pamela