

Job Costing Module map

The **Job Costing Module** is designed to help organisations manage the complete lifecycle of a job, from quotation and planning through to costing, delivery, invoicing, and profitability analysis. The module provides a central location for managing job-related activities, materials, labour, scheduling, documentation, and financial performance. By capturing all job costs and revenue in one system, users can monitor budgets, track progress, analyse profitability, and ensure accurate invoicing. The Job Costing Module integrates with purchasing, inventory, debtors, and financial management processes, giving management real-time visibility into the operational and financial performance of every job.



Job Costing Module Menu Items

Configuration

Menu Item	Explanation
Department Setup	Used to create and maintain departments that can be linked to jobs, costs, revenue, reporting, or internal responsibility areas.

Menu Item	Explanation
Function Maintenance	Used to define and maintain job-related functions or work types that may be used during job setup, costing, or operational processing.
Build Task Setup	Used to set up standard job tasks or task structures that can be reused when building or managing jobs. A dynamic Bill of Materials.
Quote Template Setup	Used to create and maintain quote templates, allowing standard wording, layouts, or predefined quote structures to be applied when preparing job quotations.
Job Team	Used to define or maintain the team members, roles, or resources associated with jobs.
Task Activity Group	Used to group job activities into logical activity categories for easier job tracking, scheduling, and analysis.
Job Properties	Used to define job-specific fields, complexity, or settings that control how job information is captured and managed. Planner allows one to control the number of jobs assigned by day, week or month for a particular category.

Activity

Menu Item	Explanation
New Quote	Used to create a new quote for a customer before the job is confirmed or approved.
Quotation	Used to view, maintain, update, or process existing job quotations.
Bookin	Used to book in job-related work, items, or activities into the system.
Manage Job	Used to maintain and control the main job record, including job details, status, customer information, and related job activity.
Job Lines	Used to enter and maintain the individual lines that make up the job, such as materials, labour, services, or other cost components.
Planned Timelog Schedule	Used to plan expected time entries or scheduled labour activities against a job.
Job Schedule Activity	Used to manage scheduled activities linked to a job, helping track planned work and operational progress.
Time Tracker Exports	Used to export time tracking information, often for payroll, costing, reporting, or external processing.
GRV to Job	Used to allocate goods received or supplier purchases directly to a job for accurate job costing.
Picking Slip	Used to create or manage picking slips for stock or materials required for a job.
Job Total Analysis	Used to review an overall summary of job totals, including costs, charges, margins, or related job financial information.

Menu Item	Explanation
Job Delivery Note	Used to create or manage delivery notes for goods, materials, or work delivered as part of a job.
Job Invoice	Used to prepare or process invoices linked to a job.
Collect / Deliver	Used to manage collection or delivery activities related to a job, including goods movement or service logistics.

Analysis

Menu Item	Explanation
Job BOM History	Used to view historical Bill of Materials information linked to jobs, helping users review what materials or components were associated with previous jobs.
Manage Job History	Used to review previously processed or completed job records and related job activity.
Job Delivery Note History	Used to view past delivery notes associated with jobs.
Document Management	Used to store, access, or manage documents linked to a job, such as quotes, drawings, delivery documents, invoices, or supporting files.
Debtors Analysis	Used to analyse debtor or customer-related information connected to jobs, such as outstanding balances, billing history, or customer account activity.
Document Search	Used to search for job-related documents or records within the system.

Reports

Menu Item	Explanation
Report List	Used to access the available reports for the Job Costing Module.
Dashboard Display	Used to display dashboard-style views of job costing information, giving users a visual summary of key job activity and performance.
Report Request	Used to request, generate, or queue reports from the Job Costing Module.
Picking Slip Report	Used to produce a report showing picking slip details for job-related materials or stock movements.

Brief Module Summary

Area	Purpose
Configuration	Sets up the master data and rules required before jobs, quotes, tasks, teams, and properties can be used.
Activity	Handles the day-to-day processing of quotes, jobs, job lines, time, deliveries, picking slips, and invoicing.

Area	Purpose
Analysis	Provides access to historical job information, document records, debtor-related analysis, and job document searches.
Reports	Provides reporting and dashboard access for reviewing job costing activity and producing operational reports.

