

Job cards and production planning

Manufacturing

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Track operations and time on the shop floor, and plan production from sales orders.

Advanced · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Available with the **Production** add-on, which any plan can add. Contact us to add it.

Overview

Job Cards record the work done at each operation. A **Production Plan** looks at your sales orders and stock and works out what to make and what to buy.

Prerequisites

BOMs with operations and workstations. Create each **Workstation** (search for it), with its working hours and hourly cost.

Steps

Job cards

1. Create a work order for a BOM with operations. A **Job Card** is created for each operation.
2. The operator opens the **Job Card**, clicks **Start Job**, works, and clicks **Complete**. The **Time Logs** record how long.
3. Enter the **Completed Qty**. Submit.

Production plan

1. Search for **Production Plan** and click **Add**.
2. Under **Get Items From**, choose *Sales Order*, and click **Get Sales Orders**, or add items by hand.
3. Click **Get Finished Goods for Manufacture**. The plan lists the items to make and the **raw materials** needed.
4. Click **Get Raw Materials for Purchase** to see what to buy, or **Get Raw Materials for Transfer** for materials to move from another warehouse. The plan adjusts for stock already on hand.
5. After submitting, click **Create > Work Order / Subcontract PO**, or create a Material Request from the plan.

Practical example

On Monday the production manager plans the week: five customer orders need 40 chairs. The plan shows enough timber for 30, so it raises work orders for 40 and a material request for the missing timber.

Important notes

- Job cards give you real times and costs per operation. Use them if labour is a large cost.
- A plan is only as good as the stock figures. Do a count first. See Opening stock and stock counts.

Common mistakes

- Planning without checking existing work orders, which duplicates production.
- Skipping the operator's time logs.

Next steps

Read Production costing and reports.

Related documentation

- Work orders and production
- Bills of materials
- From quotation to payment