# **Oval Accounting – Job Orders Training Module**

Version: 0.1

Date: 15th December 2020

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| The purpose of this document is to provide training guidance for the Job Orders feature within Oval Accounting. It should be used in conjunction with Oval Accounting.  |

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## Change History

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| --- | --- | --- |
| Version | Date | Changes |
| 0.1 | 15th December 2020 | Initial Document |
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# Introduction

The purpose of this document is to provide training for the Job Orders feature within Oval Accounting.

Use cases will be used to depict the scenario.

## Use Case 1

### Create a new Job Order.

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| --- | --- | --- |
| Step Number  | Steps  | Expected Outcome  |
| 1 | Navigate to the Job Orders tab within Oval Accounting.  | Job Orders list displayed.  |
| 2 | Click on New. | New Job Order popup displayed.  |
| 3 | Enter a close date (as a minimum) and click on save.  | Job Order created.  |
| 4 | Click on new Job Order Cost.  | New Job Order cost popup displayed.  |
| 5 | Enter the Credit and Debit Ledger Accounts the Job Order relates to.  | Ledger Accounts entered.  |
| 6 | Enter the Unit price.  | Unit price entered. |
| 7 | Enter a description.  | Description entered.  |
| 8 | Click on save.  | Job order cost has been created.  |
| 9 | Click on new Job Order Charge.  | New Job Order Charge popup displayed.  |
| 10 | Enter a Ledger Account it relates to. | Ledger Account entered. |
| 11 | Enter the Unit Price  | Unit Price is entered. |
| 12 | Enter a description.  | Description entered.  |
| 13 | Enter a Product (or Tax Rate).  | Product or Tax Rate entered.  |
| 14 | Click on save.  | Job Order Charge created. |

## Use Case 2

### Convert the Job Order Cost to a Journal.

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| --- | --- | --- |
| Step Number  | Steps  | Expected Outcome  |
| 1 | Using the example above, from the job order page, select the Job Order Cost and click on the Convert to Journal button. | New page displayed asking for a check box to be ticked.  |
| 2 | Tick the checkbox and click on next.  | A message is displayed. From here you can click to view the Accounting Journal that has been created or click Finish. |
| 3 | Click on the Finish button.  | Redirected to the Job Order  |

Use Case 3

### Convert the Job Order Charge to an Invoice.

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| --- | --- | --- |
| Step Number  | Steps  | Expected Outcome  |
| 1 | Using the example above, from the job order page, select the Job Order Charge and click on the Convert to invoice button. | New page displayed providing the option of a New Sales Invoice or Existing Sales Invoice.  |
| 2 | Select the New Sales Invoice.  | New Sales Invoice Selected.  |
| 3 | Click on the Next button.  | Redirected to the Job Order  |