

Tracking Project Job Costs

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Prepare Projects for Job-Cost Tracking

Accurate Job Costing starts with a clear Project record. Before you record purchasing costs, sales amounts, or Direct Cost Transactions, make sure the related project is available in **Projects Management** and can be identified by its **Project Name** and **Job Number**.

1. Open **Projects Management** and locate the project in **All Projects**. Confirm that the **Project Name**, **Job Number**, and **Client** identify the correct work.
2. Review the project's commercial information, including **Project Value**, **Currency**, **Start Date**, **Expected Completion On**, and **PM Responsible**, where these details are used by your team.
3. Agree on the Project record that must be selected on every related **Sales Job**, **Purchase Job**, **PO**, **Purchase Invoice**, **Invoice**, and **Direct Cost Transactions** entry.
4. If the work is based on a BOM, check that the BOM belongs to the same project workflow. The BOM defines the materials needed; use [Managing Bills of Material](#) for guidance on preparing and maintaining that list.
5. Before saving a sales or purchasing document, check the **Project** and **Job Number** details shown on the document. Selecting the wrong project at this point causes costs or sales amounts to appear under the wrong job later.

[SCREENSHOT: A project record in Projects Management showing Project Name, Job Number, Client, Project Value, Currency, Start Date, Expected Completion On, and PM Responsible.]

Use one Project record for the complete job wherever possible. Avoid creating separate projects for individual purchase orders, invoices, or delivery stages unless your team treats them as separate jobs. A single, consistent **Project** selection gives you one place to review the job's purchasing activity, sales activity, and resulting profitability.

Before work begins, make sure the people creating **Purchase Jobs**, **POs**, **Sales Jobs**, and **Invoices** know which **Project Name** and **Job Number** to select. This small

check prevents unassigned activity and reduces the need for corrections after amounts have been posted.

Set Up the Project Cost Structure

Set up the project so its costs and sales can be reviewed in meaningful groups. In Pams, the project's **Job Number** connects the work across sales, purchasing, and Job Costing. Where your project records use **Task** and **Category** values, apply them consistently to distinguish different areas of work.

1. In **Projects Management**, open the required project from **All Projects**. Check that the **Project Name**, **Job Number**, and **Client** are correct before adding related activity.
2. Identify the work areas your team needs to follow separately. For example, use the available **Task** and **Category** selections consistently for materials, external services, subcontractor work, delivery-related costs, or other work included in the project.
3. If the project is budgeted, review the available **Financial Budget**, **Budget**, and **Project Value** information. Use these values as the planned commercial baseline for the job.
4. Keep the same **Project**, **Job Number**, **Task**, and **Category** choices on related purchasing and sales records. This makes it possible to compare the amount spent with the amount sold for the same area of work.
5. Click **Save** or **Save and Close** after confirming the project information. Reopen the project to make sure the identifying details remain clear for the team.

Do not use slightly different names for the same work area across different documents. For example, if materials for a project are grouped under one **Category**, use that same selection when recording related purchase activity. Consistent grouping is more valuable than creating many narrow categories that nobody uses consistently.

[SCREENSHOT: A project record with its Job Number and the Task, Category, Budget, and Project Value information used to organize project activity.]

When a project includes both supplied products and external services, separate those activities from the beginning. This helps you identify whether a project is becoming expensive because of purchased materials, a **Service PO**, delivery-related charges, or another type of purchasing activity. It also makes later review in **Job Costing** and **Jobs Profitability** more useful.

Assign Purchasing Costs to a Project

Record purchasing activity against the correct Project before it becomes part of the job's actual cost. Pams can bring together costs from **Purchase Jobs**, **POs**, **Purchase Invoices**, and **Direct Cost Transactions** when each record uses the correct **Project** and **Job Number**.

1. Open the purchasing document you are creating or reviewing, such as a **Purchase Job**, **PO**, **Purchase Invoice**, or **Direct Cost Transactions** record.
2. Select the correct **Project** and verify the related **Job Number**. Compare them with the Project record in **Projects Management** before you save the document.
3. Review the document's **Items**, **Quantity**, **Item Price**, and **Total Price**. Make sure the products, materials, services, or subcontractor charges belong to the selected project.
4. Where the record includes **Task** or **Category**, choose the work area that matches the purchase. Use the same selections already agreed for the project so similar costs are grouped together.
5. Check the **Sub-supplier** or **Vendor**, **Currency**, and any applicable **Delivery Date** or **Required Receiving Date** details before saving.
6. Click **Save** or **Save and Close**, then reopen the document and confirm the displayed **Project** and **Job Number**.

[SCREENSHOT: A purchasing document showing Project, Job Number, Sub-supplier, Items, Quantity, Item Price, Total Price, Task, and Category.]

For a purchase that contains items for more than one project, do not leave all costs under one Project record. Review the item lines and record each portion under the project that will use it. Where Pams presents separate project allocation choices for the items, select the appropriate **Project**, **Task**, or **Category** for each part of the purchase.

Treat additional project-related charges with the same care. **Logistics Costs**, **Additional Landed Cost**, **Outbound Cost**, and **Deliverery Costs to the Client** can affect the job's actual cost. If these costs belong to a project, ensure the purchasing or Direct Cost Transactions record identifies that project rather than leaving the amount unrelated to the job.

Relate Sales Transactions to Project Revenue

Link sales activity to the same Project used for purchasing costs. This allows Pams to show the commercial side of the job alongside the amounts spent to deliver it. Use the **Project** and **Job Number** on related sales records consistently from the initial **Sales Job** through the **Invoice**.

1. Open the relevant **Sales Job**, **Orders**, or **Invoice** for the project work.
2. Select the correct **Project** and confirm the **Job Number** matches the project used on related **Purchase Jobs**, **POs**, and **Purchase Invoices**.
3. Review the customer and sales details, including **Client**, **Currency**, **Sales Price**, **Total Price**, **Delivery Date**, and **Payment Method**, where those fields are used on the document.
4. Where available, select the appropriate **Task** or **Category** for the work being sold. Use the same work grouping used for the related purchasing activity.
5. Confirm that the sales line or document represents project work rather than unrelated sales activity. If it includes work for multiple projects, review each portion before saving.
6. Click **Save** or **Save and Close**, then check that the document continues to show the intended **Project** and **Job Number**.

[SCREENSHOT: A sales document showing Client, Project, Job Number, Items, Sales Price, Total Price, Delivery Date, and Task or Category.]

Use the project reference on invoices as well as earlier sales documents. An **Invoice Amount** recorded without the correct **Project** cannot be confidently compared with the project's purchasing costs. Keeping the Project selection through invoicing supports an accurate view of sales revenue for the job.

Where a project has staged delivery or partial invoicing, record each sales document against the same **Project** and **Job Number**. This keeps all invoiced amounts together while allowing Pams to reflect the project's ongoing revenue as work is delivered and billed.

Review Actual Costs and Sales for Each Project

Use **Job Costing** to review how much has been spent and sold for each project. Start with the Project record's **Project Name** or **Job Number**, then compare project-related purchasing activity with the sales amounts recorded under the same project.

1. Open **Job Costing** and locate the required project using its **Project Name** or **Job Number**.

2. Review the purchasing amounts connected to the project, including activity from **Purchase Jobs, POs, Purchase Invoices, and Direct Cost Transactions.**
3. Review the sales amounts connected to the same project, including the related **Sales Jobs, Orders, and Invoices.**
4. Compare actual purchasing costs with the project's sales value. Where the project uses a **Financial Budget**, compare the recorded amounts with the available **Budget and Project Value.**
5. Open **Jobs Profitability** when you need to review the project's commercial result in more detail.
6. Investigate amounts that do not appear to belong to the project. Check the original record's **Project, Job Number, Task, and Category** before deciding whether a correction is needed.

[SCREENSHOT: The Job Costing screen showing a project identified by Project Name and Job Number, with purchasing costs, sales amounts, and project values.]

Use the project's work groupings to focus your review. If materials are much higher than expected, open the related purchasing documents and review the **Items, Quantity, Item Price, and Total Price.** If revenue is lower than expected, review the project's **Sales Jobs, Orders, and Invoices** to see whether work has not yet been invoiced or was linked to a different project.

A project may show costs before sales revenue is recorded, especially when goods are purchased before delivery or invoicing. Review the document dates, including **Order Date, Delivery Date, Received On, and Invoice Date** where shown, before treating this timing difference as a cost issue.

Correct Costs or Revenue Posted to the Wrong Project

When a cost or sales amount appears under the wrong project, correct the related purchasing or sales document rather than trying to change totals in **Job Costing** directly. The Project record should reflect the activity recorded on its connected documents.

1. In **Job Costing** or **Jobs Profitability**, identify the amount that appears under the wrong **Project Name** or **Job Number.**
2. Open the related document, such as the **Purchase Job, PO, Purchase Invoice, Direct Cost Transactions** record, **Sales Job, Orders, or Invoice.**
3. Check the **Project** and **Job Number** first. If the document belongs to another project, select the correct project details before saving the correction.

4. If the Project is correct but the amount is grouped under the wrong work area, review the available **Task** and **Category** selections and choose the appropriate one.
5. Use the correction option available on the document. Depending on the document and its status, Pams may provide actions such as **Revision**, **Order amendment**, or **Adjust Allocation**. Use only the action shown for that record.
6. Click **Save** or complete the available correction action. Return to **Job Costing** and confirm that the cost or sales amount now appears under the intended Project and work grouping.

[SCREENSHOT: A purchasing or sales document with Project, Job Number, Task, and Category highlighted before a correction is saved.]

Do not create a replacement transaction merely to offset a mistake unless that is your team's established process. First check whether the original document can be corrected through its available action. A duplicate purchasing cost or invoice amount can make the project appear more expensive or more profitable than it really is.

After correcting a document, review any connected sales, purchasing, and invoice records that use the same **Job Number**. A wrong project selection is often repeated when documents were created from an earlier record. Rechecking the chain helps keep the project's actual cost and revenue complete.

Overview

Job Costing in Pams brings project-related purchasing costs and sales revenue into one project view. The central link is the **Project** and its **Job Number**. When those details are used consistently, you can review a project's commercial position without manually combining figures from separate purchasing and sales records.

Use the following records as part of the job-cost workflow:

Record or screen	What it contributes to the project review	Key details to check
Projects Management	The main Project record for the job	Project Name, Job Number, Client, Project Value
Purchase Jobs, POs, and Purchase Invoices	Purchased materials, services, and supplier charges	Project, Job Number, Items, Total Price
Direct Cost Transactions	Other direct project-related costs	Project, Job Number, Amount, Category

Record or screen	What it contributes to the project review	Key details to check
Sales Jobs, Orders, and Invoices	Sales value and invoiced project revenue	Project, Job Number, Sales Price, Invoice Amount
Job Costing and Jobs Profitability	Review of recorded project costs, sales, and profitability	Project Name, Job Number, Budget, Project Value

The job-cost view is only as reliable as the records connected to it. A purchase entered with the wrong **Project**, or an invoice saved without the related **Job Number**, can make the project's results incomplete or misleading.

Use **Job Costing** during the project, not only after delivery. Reviewing costs after major purchases, goods receipt activity, Orders, or invoices helps you identify changes in cost exposure while there is still time to respond. For work involving materials and procurement, keep the project's BOM and purchasing activity aligned; see [Managing Bills of Material](#).

Prerequisites

Before tracking costs and revenue in **Job Costing**, make sure the required project and commercial records are already available in Pams. Job-cost review depends on connected project, purchasing, and sales activity rather than on manually entered project totals.

- A Project must be available in **Projects Management** with a clear **Project Name** and **Job Number**.
- The project should identify the correct **Client** and, where used by your team, the **PM Responsible, Currency, Project Value, Start Date, and Expected Completion On**.
- The products, materials, and services needed for the work should be understood before related **Purchase Jobs, POs, or Purchase Invoices** are entered. If the project uses a BOM, maintain it through [Managing Bills of Material](#).
- Team members entering **Purchase Jobs, POs, Purchase Invoices, Direct Cost Transactions, Sales Jobs, Orders, and Invoices** need to know the correct **Project Name** and **Job Number** for the work.
- If your team uses **Task** and **Category** values, agree on the selections to use before posting purchasing costs or sales amounts. Use the same values on related documents.

- Where a budget is required, ensure the available **Financial Budget**, **Budget**, and **Project Value** information has been reviewed before comparing planned and actual amounts.
- Use only completed, relevant purchasing and sales documents when checking project results. Review their displayed **Project** and **Job Number** before relying on the amounts in **Job Costing**.

Once project costs and revenue are being reviewed consistently, continue with [Managing Tender Sales Jobs](doc:managing-tender-Sales Jobs) to track tender requirements, bid due dates, documents, contacts, and offer activity.