

Job Cost — Learning Path

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This learning path is for Job Cost users who need to allocate cost transactions to purchasing or sales activity. You will learn how to select the appropriate allocation destination, create allocations using the available Job Cost allocation screens, and apply a consistent decision process when allocating costs during daily and periodic job-cost work.

Learning objectives

- By the end of this path you can determine whether a cost allocation should be directed to a purchase order or to sales.
- By the end of this path you can create a new cost allocation to a purchase order from Job Cost.
- By the end of this path you can create a new cost allocation to sales from Job Cost.
- By the end of this path you can use the correct allocation workflow for common job-cost scenarios.
- By the end of this path you can review your allocation choice before completing daily or periodic allocation work.

Prerequisites

- Access to the Job Cost app.
- Permission to create cost transaction allocations.
- Familiarity with the business purpose of purchase orders and sales activity in your organization.
- The cost transaction and destination information needed for the allocation scenario.

Module 1: Choose the right allocation destination

Goal: Learn to identify whether the business scenario requires a purchase-order allocation or a sales allocation.

Lesson 1.1: Route a cost to purchasing activity

When a job cost needs to be associated with purchasing activity, your goal is to begin an allocation that is directed to a purchase order. Open **Cost Transaction - New Allocation to PO** and use the purchase-order allocation workflow for the cost transaction.

Practice task: Open the purchase-order allocation screen and identify a cost-allocation scenario in your work that should be routed to a purchase order.

Lesson 1.2: Route a cost to sales activity

When a job cost needs to be associated with sales activity, your goal is to use the sales allocation workflow rather than the purchasing workflow. Open **Cost Transaction - New Allocation to Sales** and create the allocation using the sales destination workflow.

Practice task: Open the sales allocation screen and identify a cost-allocation scenario in your work that should be routed to sales.

Module 2: Create allocations during daily job-cost work

Goal: Apply the correct allocation workflow as new cost transactions are processed.

Lesson 2.1: Create a new allocation to a purchase order

A cost transaction may need to be passed to purchasing so that the related job cost is reflected in purchase-order activity. From **Cost Transaction - New Allocation to PO**, start a new allocation and complete the purchase-order allocation process for the transaction.

Practice task: Using a suitable training or work scenario, create a new allocation to a purchase order.

Lesson 2.2: Create a new allocation to sales

When the cost transaction belongs with sales activity, your goal is to allocate it through the sales workflow. From **Cost Transaction - New Allocation to Sales**, start a new allocation and complete the sales allocation process for the transaction.

Practice task: Using a suitable training or work scenario, create a new allocation to sales.

Module 3: Apply allocation decisions consistently

Goal: Use a repeatable decision process to prevent costs from being routed to the wrong business activity.

Lesson 3.1: Correctly handle a purchasing-related cost

During review of job costs, you may find a transaction that supports obtaining goods or services for the job. Your goal is to route it to purchasing, not sales. Open **Cost Transaction - New Allocation to PO** and use that workflow to create the new allocation.

Practice task: Describe why one current or sample cost transaction belongs in the purchase-order allocation workflow, then open the related screen.

Lesson 3.2: Correctly handle a sales-related cost

During review of job costs, you may find a transaction that should be associated with sales activity. Your goal is to route it to sales, not a purchase order. Open **Cost Transaction - New Allocation to Sales** and use that workflow to create the new allocation.

Practice task: Describe why one current or sample cost transaction belongs in the sales allocation workflow, then open the related screen.

Module 4: Complete periodic allocation review

Goal: Use the two allocation workflows to process outstanding job-cost allocation scenarios efficiently and accurately.

Lesson 4.1: Process a group of purchase-order allocations

At period-end or during a regular job-cost review, first separate transactions that belong with purchasing activity. For each applicable transaction, open **Cost Transaction - New Allocation to PO** and create the purchase-order allocation.

Practice task: Make a short list of sample transactions that should be processed through the purchase-order allocation workflow.

Lesson 4.2: Process a group of sales allocations

After processing purchasing-related items, handle the transactions that belong with sales activity. For each applicable transaction, open **Cost Transaction - New Allocation to Sales** and create the sales allocation.

Practice task: Make a short list of sample transactions that should be processed through the sales allocation workflow.

Final assessment

1. A cost transaction is related to purchasing activity for a job. Which allocation workflow should you use, and where do you start?
2. A job-cost reviewer determines that a transaction should be associated with sales activity rather than purchasing. Which screen should they open?
3. You are processing several transactions during a periodic review. What decision should you make before selecting either allocation screen?
4. A user opens the purchase-order allocation workflow for a transaction that belongs with sales activity. What should the user do instead?
5. You have identified two groups of transactions: one tied to purchasing activity and one tied to sales activity. How should you process the groups in Job Cost?

Answers

1. Use the purchase-order allocation workflow starting from **Cost Transaction - New Allocation to PO**.
Why: The transaction is associated with purchasing activity.
2. Open **Cost Transaction - New Allocation to Sales**.
Why: The transaction belongs with sales activity.
3. Decide whether each transaction belongs with purchase-order activity or sales activity.
Why: That decision determines the correct allocation workflow.
4. Stop using the purchase-order workflow and use **Cost Transaction - New Allocation to Sales**.
Why: Sales-related costs should be allocated through the sales workflow.
5. Process purchasing-related transactions through **Cost Transaction - New Allocation to PO** and sales-related transactions through **Cost Transaction - New Allocation to Sales**.

Why: Separating transactions by destination supports consistent and accurate allocation.