

# WeSuite – How to Setup Invoice Items in Sedona and Map to Chargeable Items in WeSuite

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## SedonaOffice

Before setting up the Invoice Items in SedonaOffice Setup you first need to set up the Job Expense Types because Each Invoice Item is linked to a Job Cost Type (Job Expense Type)

Job Expense Types:

Job Expense Types are used to categorize types of expenses related to Tickets and Jobs. There are five pre-defined records in this table which have a specific purpose within the application; you may not delete or modify these expense types. M – Materials L – Labor C – Commission V – Overhead O – Other

Additional expense types may be created to track expenses: See below examples.

Subcontractor – S

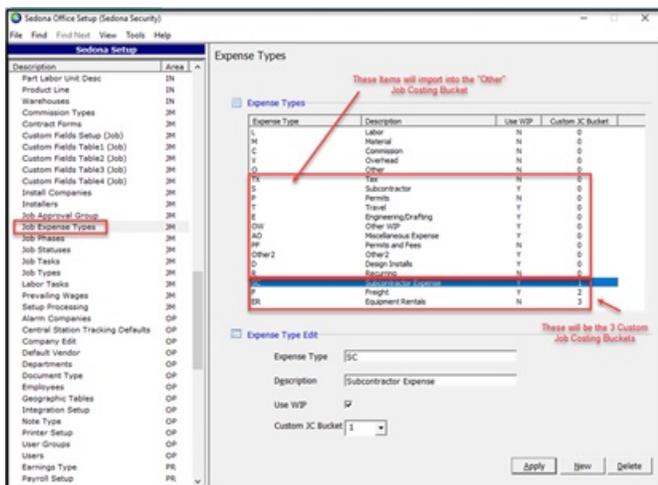
Engineering services – E

Permit and fees – P

Equipment rentals – ER

Freight – F

These Additional Expense Types can also be set up to use for Custom Job Costing Buckets in SedonaOffice.



**Costing**

Estimated

**Income**

Install Charge \$0.00

Change Orders \$0.00

**Costs**

Parts \$0.00

Labor \$0.00

Overhead \$0.00

Subcontractor \$0.00

Freight \$0.00

Equipment Rental \$0.00

Other \$0.00

Sub Total \$0.00

Sub Profit/Loss \$0.00

Commissions \$0.00

Total \$0.00

Profit/Loss \$0.00

Apply

**Invoice Items:**

When creating an Invoice Item in SedonaOffice, select the appropriate Job Costing Type (Job Expense Type) that will be mapped in WeSuite to a Charge Item or selected as an Invoice Item in Accounting Job Setup.

Examples of SedonaOffice Invoice Items:

- Labor Install - WeSuite (Expense Type - L)
- WeSuite Charge Item O (Expense Type - O)
- Subcontractor (Expense Type - S)
- Equipment Rental (Expense Type - ER)
- Freight (Expense Type - F)
- WeSuite - Conduit M (Expense Type M)

Item Edit

Item Type: OC  
*Other Charge*

Account: 520010  
*COS - Service-Other*

Category: Admin G & A  
*Administration G\_A*

Item: WeSuite - Charge Item OC

Description: WeSuite - Charge Item OC

Default Rate: 13.00

Job Costing: O

Default Cost: 13.00

Alt Description:

Apply New Delete

Item Edit

Item Type: OC  
*Other Charge*

Account: 510006  
*COS - Jobs-Equipment Rental*

Category: Jobs Res  
*Jobs - Residential\_Small Commercial*

Item: Equipment Rental

Description: Equipment Rental

Default Rate: 275.00

Job Costing: ER

Default Cost: 275.00

Alt Description:

Apply New Delete

Item Edit

Item Type: SubContractors  
SubContractors

Account: 122125  
WIP - Subcontract Labor

Category: Jobs Res  
Jobs - Residential\_Small Commercial

Item: \*SubContractor

Description: SubContractor

Job Costing: SC

Default Rate: 200.00

Default Cost: 200.00

Alt Description:

Buttons: Apply, New, Delete

Options: Inactive, Tagable, Available in Sales, Available in Service

## WeSuite

This Estimate has Chargeable Items that are linked to Custom Buckets in SedonaOffice for Subcontractor, Equipment Rental, and Freight.

There are also Chargeable Items using the Labor Cost Type, Materials, and Other.

| Remove | Chargeable Item            | Description                  | Expense Types | QTY | % | Unit Cost | EXT Cost | Sell     | EXT Sell | GPM |
|--------|----------------------------|------------------------------|---------------|-----|---|-----------|----------|----------|----------|-----|
|        | *Labor Install - WeSuite   | *Labor Install - WeSuite     | L             | 1   |   | \$200.00  | \$200.00 | \$200.00 | \$200.00 |     |
|        | **WeSuite - Charge Item O  | **WeSuite - Charge Item O    | O             | 1   |   | \$13.00   | \$13.00  | \$13.00  | \$13.00  |     |
|        | *SubContractor             | SubContractor                | S             | 1   |   | \$300.00  | \$300.00 | \$300.00 | \$300.00 |     |
|        | *Equipment Rental          | *Equipment Rental            | ER            | 1   |   | \$275.00  | \$275.00 | \$275.00 | \$275.00 |     |
|        | *Freight                   | Freight                      | F             | 1   |   | \$15.00   | \$15.00  | \$15.00  | \$15.00  |     |
|        | **WeSuite - Conduit - M    | **WeSuite - Conduit - M      | M             | 1   |   | \$100.00  | \$100.00 | \$100.00 | \$100.00 |     |
|        | ***WeSuite-Intrusion Insta | ***WeSuite-Intrusion Install | OW            | 1   |   | \$250.00  | \$250.00 | \$250.00 | \$250.00 |     |

When completing the Accounting Process in WeSuite, if one or more Chargeable Items are included in the Estimate, you must have the "Combine Invoice Other" option selected.

If you have selected Chargeable Items that are mapped to the Custom Buckets in SedonaOffice, then you must also select an "Other Invoice Type" as well as having the "Combine Invoice Other" selected.

Accounting Job Setup

Below are the jobs the Accounting System will Create. Please input a name for each new Job.

Material Invoice Item: None Selected

Combine Material:

Labor Invoice Item: None Selected

Combine Labor:

Other Invoice Item: **Other Invoice Item**

Combine Other: **Combine Other**

Other Invoice Item dropdown: \*\*Other Invoice - ...

Combine Other checkbox:

When the Job is created in Sedona, the Chargeable Items import into the correct Costing Buckets.

The Labor and Material Chargeable Items are added to the Parts and Labor Buckets.

The Custom Buckets are imported into the correct Custom Buckets.

The Chargeable Items linked to "O" and "OW" are combined in the Other Costing Bucket.

- Job
- Sales Summary
- Work Order
- Job System
- Bill To
- Tasks
- Installs \$1,153.00
- Recurring \$0.00
- Materials \$0.00
- Job Costing

| Job                        | Customer 48800               | Site                        |
|----------------------------|------------------------------|-----------------------------|
| Job Number 5227-11         | Amy Bartimus                 | Amy Bartimus Mountain House |
| Job Type ACC-Res           | Amy Bartimus Primary Bill To | 1234 Mountain View          |
| Job Status Parts           | 1234 Hello Hwy               | Daphne, AL 36526            |
| New System Access          |                              |                             |
| Labor Units 0.0 (0.0 Used) |                              |                             |

| Costing          |            |                  |            |
|------------------|------------|------------------|------------|
|                  | Estimated  | Actual           | Variance   |
| <b>Income</b>    |            |                  |            |
| Install Charge   | \$1,153.00 | \$0.00           | \$1,153.00 |
| Change Orders    | \$0.00     | Hold Back \$0.00 |            |
| <b>Costs</b>     |            |                  |            |
| Parts            | \$100.00   | \$0.00           | \$100.00   |
| Labor            | \$200.00   | \$0.00           | \$200.00   |
| Overhead         | \$0.00     | \$0.00           | \$0.00     |
| Subcontractor    | \$300.00   | \$0.00           | \$300.00   |
| Freight          | \$15.00    | \$0.00           | \$15.00    |
| Equipment Rental | \$275.00   | \$0.00           | \$275.00   |
| Other            | \$263.00   | \$0.00           | \$263.00   |
| Sub Total        | \$1,153.00 | \$0.00           | \$1,153.00 |
| Sub Profit/Loss  | \$0.00 0%  | \$0.00 100%      | \$0.00     |
| Commissions      | \$0.00     | \$0.00           | \$0.00     |
| Total            | \$1,153.00 | \$0.00           | \$1,153.00 |
| Profit/Loss      | \$0.00 0%  | \$0.00 100%      | \$0.00     |

| WIP              |        |
|------------------|--------|
| Material 1       | \$0.00 |
| Material 2       | \$0.00 |
| Labor            | \$0.00 |
| Subcontractor    | \$0.00 |
| Freight          | \$0.00 |
| Equipment Rental | \$0.00 |
| Overhead         | \$0.00 |
| Commissions      | \$0.00 |
| Other            | \$0.00 |
| <b>Total WIP</b> | \$0.00 |

| Recurrings    |        |
|---------------|--------|
| <b>Est</b>    |        |
| Job RMR       | \$0.00 |
| <b>Act</b>    |        |
| Activated RMR | \$0.00 |

Apply  Include WIP Amounts