WeOpportunity, WeEstimate & QuoteAnywhere

SOIM Reference Guide
Release 4.9.4.5

SedonaOffice Integration Module – SOIM

The SedonaOffice Integration Module has been developed collaboratively between WeSuite and SedonaOffice and is supported by WeSuite and SedonaOffice. The SOIM is a powerful tool that automates many aspects of recording lead information, estimating and quoting jobs in WeEstimate and transferring "won" or booked sales information to SedonaOffice for job or work order creation in an automated fashion.

Key benefits:

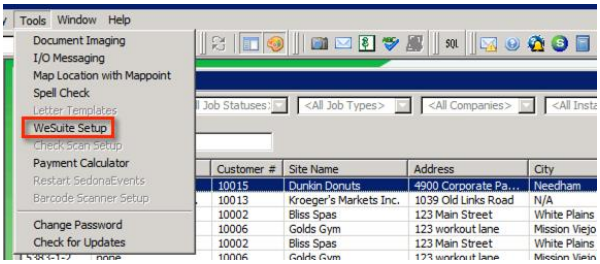
- Real time search on existing customers, site and billing addresses and contacts in SedonaOffice from WeOpportunity, WeEstimate and QuoteAnywhere.
- Real time search on the parts inventory database withi SedonaOffice directly from WeEstimate for selection and inclusion on Estimates in WeEstimate.
- Real time search on existing Chargeable Items (Invoice Items) and RMR (recurring monthly revenue) Items defined in SedonaOffice for selection and inclusion on Estimates in WeEstimate.
- Mapping of Parts, Labor Categories, Chargeable Items and RMR Items defined in WeEstimate to SedonaOffice.
- Automated preparation of job information from WeEstimate for transfer to SedonaOffice for job creation.
- Time and resource savings due to multiple manual data entry, dated information and mistakes.

Getting started:

A connection between the SedonaOffice and WeEstimate applications must first be enabled. During deployment of the SOIM with WeSuite, the WeSuite Project Manager will assist in configuration of the module. Please coordinate activating the integration within the SedonaOffice application with SedonaOffice directly. SedonaOffice will provide a key for activation of the Module with SedonaOffice. This must be done prior to use of the SOIM Module in WeEstimate in order for "won" Estimate information to be exported for import by SedonaOffice.

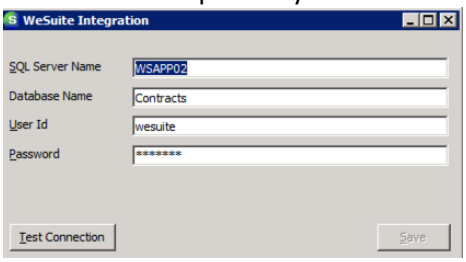
To ensure use of the current SedonaOffice database for searches within WeEstimate, confirm the SedonaOffice: data source (server), database name, etc. with your IT Department or SedonaOffice. (Please refer to the following screen shots for more information).

In SedonaOffice, to verify that WeEstimate is enabled go to: Tools → WeSuite Setup.



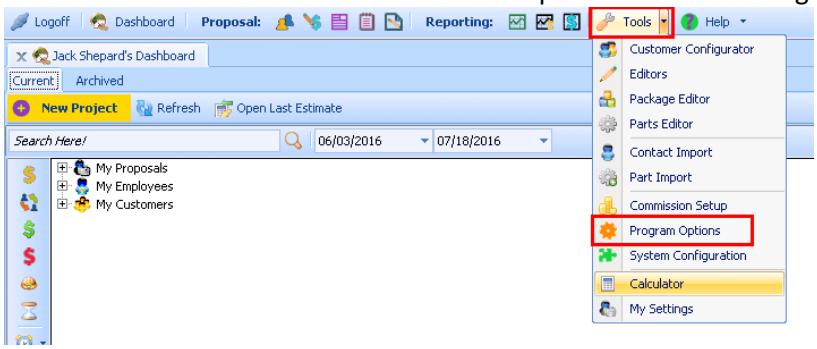
Please note: System Administrator permissions in SedonaOffice may be required to access this feature.

After clicking on WeSuite Setup, the WeSuite Integration window will appear. Please note: it is important to complete that the User ID and Password fields are not empty, if empty the import will not work. If this is the case, contact SedonaOffice and WeSuite respectively for assistance in completion of this setup.

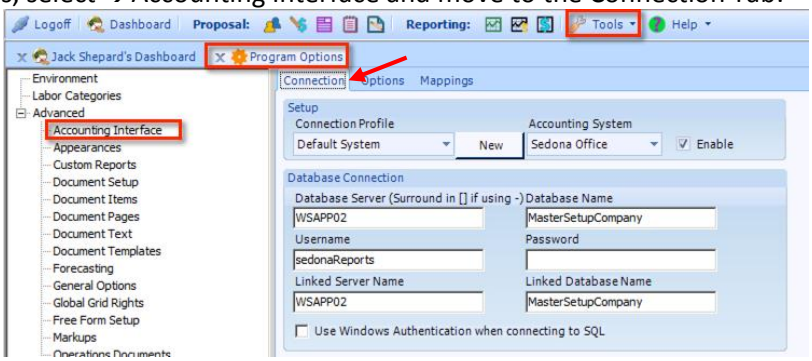


Configuring the Integration Module within WeEstimate:

At the highest level WeEstimate tool bar click: Tools. At the drop down select: → Program Options.



At Program Options, select →Accounting Interface and move to the Connection Tab:



Connection Tab: The Connection Tab indicates the connection information and settings needed for the integration between WeSuite and SedonaOffice within WeSuite.

Setup:

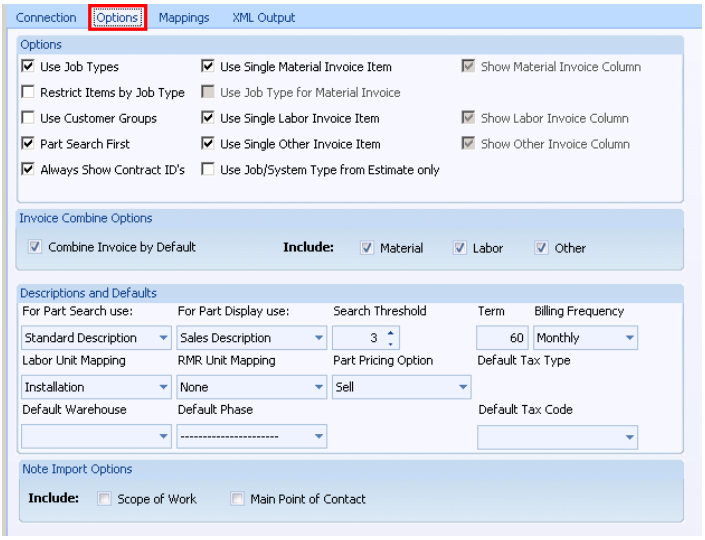
Connection Profile: from the drop down the "Default System" is selected.

Accounting System: from the drop down select "SedonaOffice".

Enable: check the "enable" box, enabling the connection to SedonaOffice as the default Accounting Interface for this system configuration. (Keep in mind that you also need to contact and coordinate with SedonaOffice to enable the integration from within SedonaOffice.)

Database Connection: the information within this area should be completed with assistance from your IT personnel and coordination with WeSuite to ensure connection to the correct server, database, etc.

Options Tab: The Options Tab provides a variety of features for configuration of the "read" of data from SedonaOffice and "write", or export of data for SedonaOffice. Below is a brief description of functionality of each:

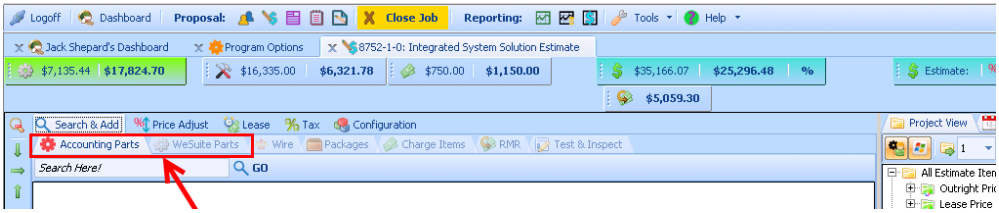


Use Job Types: Check the box to read/use Job Types defined in SedonaOffice in WeSuite. SedonaOffice Job Types will be read directly from SedonaOffice and used instead of Job Types that may be defined in WeEstimate.

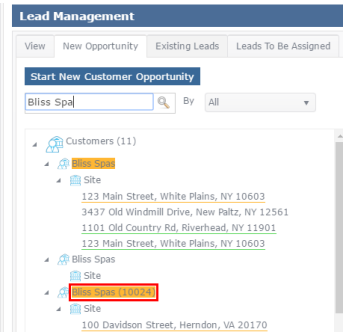
Restrict Items by Job Type: Check the box to enable restriction of the list of Chargeable and RMR Items from SedonaOffice, by Job Type. When SedonaOffice Chargeable Items and/or RMR Items are searched for from the Estimate screen, they will be listed in accordance with Job Types defined in SedonaOffice.

Use Customer Groups: When checked, the SedonaOffice Customer Group will govern the search of existing customers from SedonaOffice for selection in WeEstimate. This feature is typically used by companies with very large customer entities with many Sites to help sales people more easily locate the existing Customer they are looking for. Default Customer Groups can be assigned at the Office level within WeEstimate.

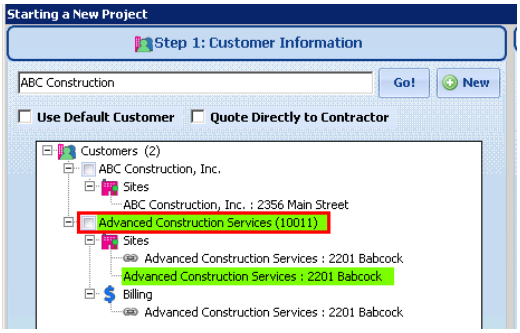
Part Search First: If utilizing both the WeSuite parts database and the SedonaOffice parts database, checking the Part Search First checkbox moves the Accounting Parts Tab to appear first, followed by the WeSuite Parts Tab at the Estimate screen. This assumes the Accounting Parts database is used more often for parts search.



Always Show Contract IDs: This check box option when checked, displays the SedonaOffice Customer ID in parenthesis to the right of the Customer name when search results are shown for Customer selection in WeSuite.



WeOpportunity



WeEstimate

Use Single Material Invoice Item: This option designates how part pricing is shown in SedonaOffice *after* the Job Import process is completed for each "won" Estimate/job from WeEstimate. When checked, the total parts/material sell price is one lump sum. This total is an Invoice Item assigned to the Job Type in SedonaOffice. As use of this selection has to do with job configuration and output in SedonaOffice, it is recommended that a discussion with the finance team, SedonaOffice and WeSuite is coordinated prior to finalizing the selection.

Use Job Type for Material Invoice: This selection enables control of the appearance of total sell price of material from WeSuite, governed by the Job Type defined in SedonaOffice.

Use Single Material Invoice Item: When checked, this will require Users during the Estimate export process in WeEstimate, to select Material Invoice Items individually filtered by Job Type, prior to import by SedonaOffice.

Use Single Labor Invoice Item: This check box requires Users, when preparing Estimates for export from WeEstimate, to select Invoice Items individually (filtered by Job Type) for Labor items included in Estimates, prior to import by SedonaOffice.

Use Single Other Invoice Item: This check box requires Users, when preparing Estimates for export from WeEstimate, to select Invoice Items individually (filtered by Job Type) for Chargeable Items included in Estimates, prior to import by SedonaOffice.

Use Job/System Type From Estimate Only: Selection of this checkbox will force *all* items on an estimate in WeEstimate to be of the Job and System type assigned at the Estimate level versus the item level.

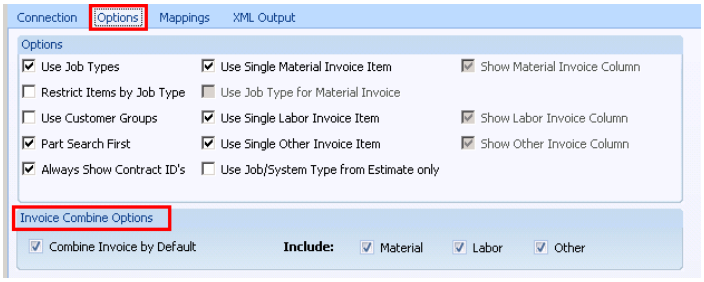
Show Material Invoice Column: when this box is checked, the Material Invoice Item column is displayed and selectable (drop down) at the Job Export/Accounting Import screen in WeEstimate.

Shown Labor Invoice Column: when this box is checked, the Labor Invoice Item column is displayed and selectable (drop down) at the Job Export/Accounting Import screen in WeEstimate.

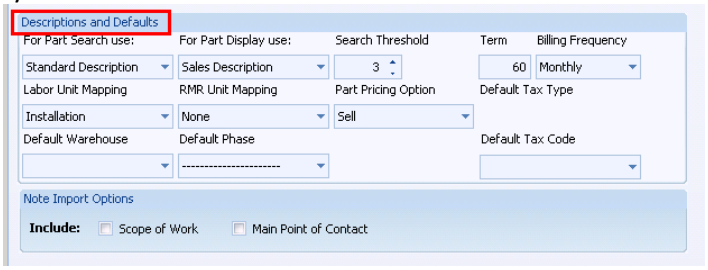
Show Other Invoice Column: when this box is checked, the Chargeable Item Invoice Item column is displayed and selectable (drop down) at the Job Export/Accounting Import screen in WeEstimate.

Invoice Combine Options:

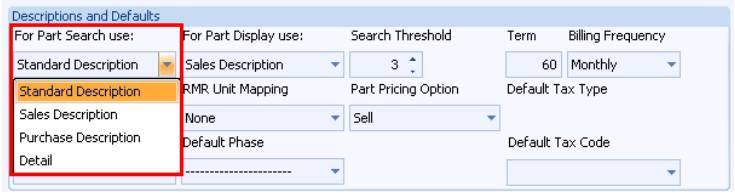
Combine Invoice by Default: When checked, Material, Labor and "other" items (Chargeable Items) will be combined into one invoice item for SedonaOffice. When unchecked, the User will be required to select a SedonaOffice Invoice Item for each Material, Labor and Chargeable Item on each Estimate/Job.
Include: check the boxes of items to include in the combined Invoice Item.



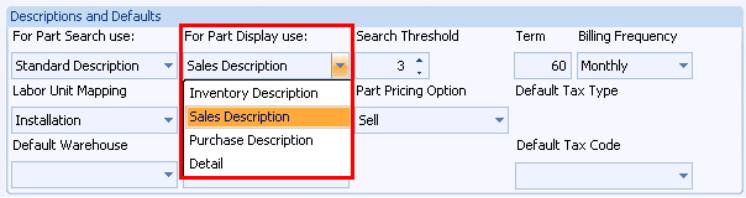
Descriptions and Defaults: at Descriptions and Defaults, selection are made for data searches from SedonaOffice and display of data within WeEstimate.



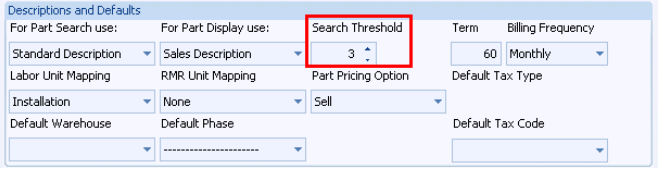
For Part <u>Search</u> Use: Four options are available from SedonaOffice for part seach: Standard Description, Sales Description, Purchase Description, Detail Description. Select the description field for WeEstimate to access when searching for accounting parts on the SedonaOffice database. Refer to the SedonaOffice Item Inventory detail screens to review each description selection at the drop down.



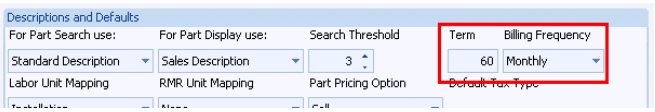
For Part <u>Display</u> Use: Four options: Inventory Description, Sales Description, Purchase Description and Detail Description, are available for display of parts, from Sedonaoffice within WeEstimate after a search is run.



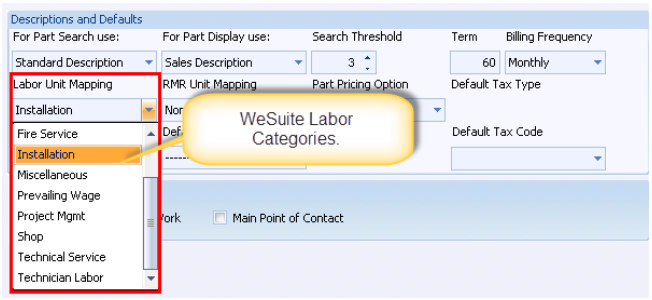
Search Threshold: Allows the setting of the minimum number of characters to be entered for a search, prior to the Part search function to start. Three (3) characters is the minimum selection.



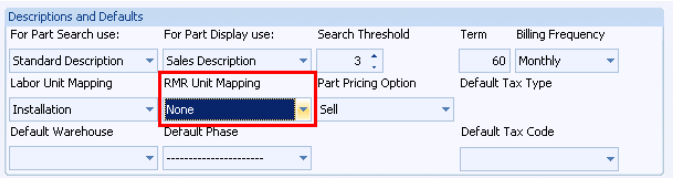
Term and Billing Frequency: Enables selection of default settings for "Term"and "Billing Frequency" for Recurring Revenue at the part level from SedonaOffice. Billing Frequency selections include: Monthly, Quarterly, Semi-Annual, Annual.



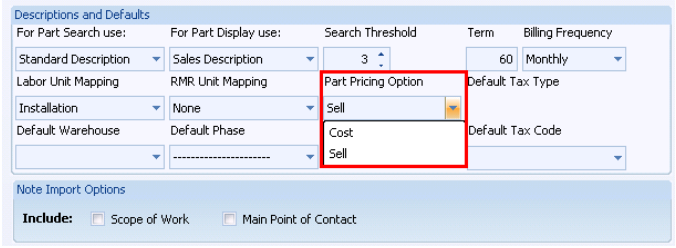
Labor Unit Mapping: enables mapping (association) of Labor Units (hours) at the part level from SedonaOffice, to a selected Labor Category in WeEstimate. The hourly cost/sell pricing calculations will happen automatically and be in accordance with the WeEstimate Labor Category selection multiplied by the hours per part from SedonaOffice.



RMR Unit Mapping: This mapping is used only if RMR (recurring monthly revenue) dollar amounts have been specified at the part level in SedonaOffice and it is desired to have WeEstimate "read" and include that RMR dollar amount when parts are brought on to Estimates in WeEstimate. This enables parts to come in to WeEstimate with an "E-RMR" or Equipment RMR value per part from SedonaOffice. When used, WeEstimate calculates the E-RMR value from the parts that are used in a quote with an E-RMR value. That E-RMR value is attributed to the RMR sold on each job.

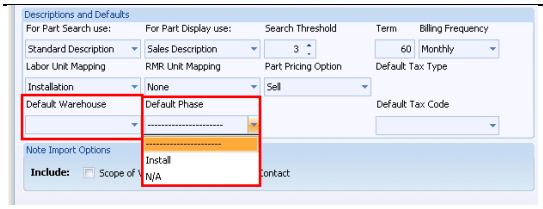


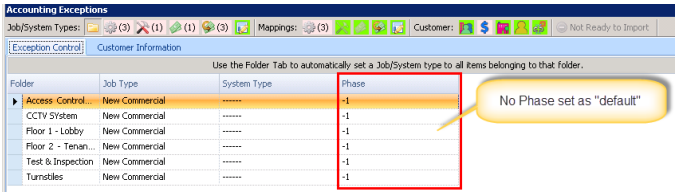
Part Pricing Option: This selection is made to present either "Cost" or "Sell" pricing from the selection of parts from the SedonaOffice database, as displayed in WeSuite. This is important for determining the estimated versus actual gross profit margin. If SedonaOffice has a fixed sell amount for a part ("Sell" option in SedonaOffice is on), then that price is used first, before default margin from WeEstimate.



Default Warehouse: the selection at the drop down would be for a default "warehouse" from SedonaOffice.

Default Phase: the selection is for a default Phase to be applied at the Accounting Export screen from WeEstimate. Users who perform the Accounting Export will be able to change the default phase selection as needed at the time of Job export.

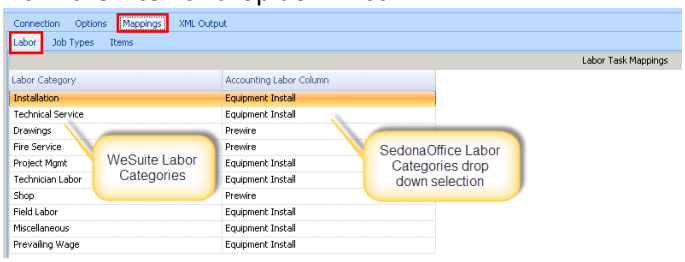




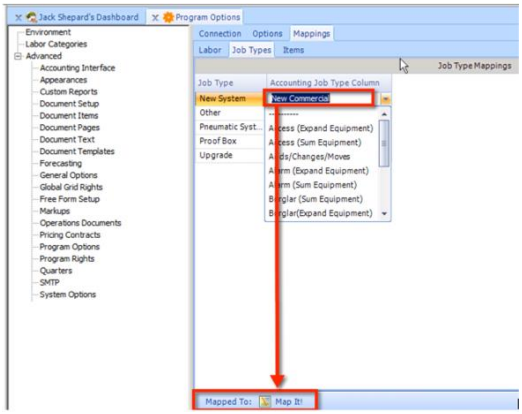
Default Tax Code: used for QuickBooks interface.

Mapping Tab:

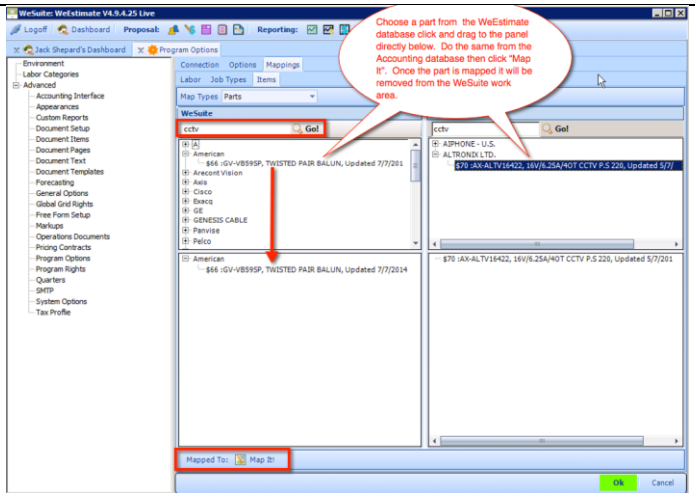
Labor Category Mapping: Each Labor Category defined in WeEstimate needs to be mapped to the like or appropriate Accounting Labor Category in SeondaOffice. When hours for Labor Categories are included on won Estimates in WeEstimate, those Labor Categories, hours and related cost/sell information is provided to SedonaOffice for use in job creation. The mapping of labor categories follows the same method used for mapping of other items in the "Items" drop down list.



Job Types: If Job Types are defined in WeEstimate, they can be mapped to a Job Type in SedonaOffice. Mapping Job Types from the Job Types tab, maps each universally in the system as a whole. Mapping Job Types here means that Job Types will not have to be selected at the time of the Accounting Exception check for transfer of Estimate information from WeSuite to SedonaOffice. To map a Job Type, match the Job Type from WeEstimate (left column) with one selected the Accounting Job Type column drop down. Click "Map It" at the bottom of the window.



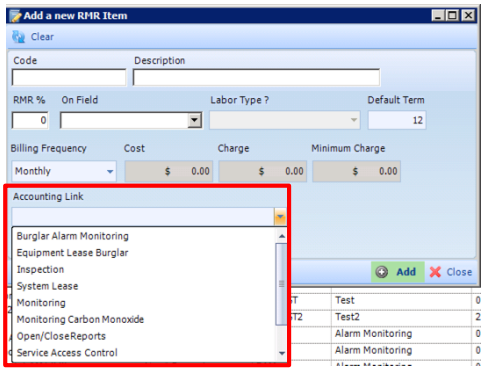
Items Mapping: When parts are stored in the WeEstimate database, those parts will require either a) set up in the SedonaOffice inventory or b) mapping to like parts in SedonaOffice. Mapping streamlines the Job export/import process at the Accounting Exception check, as the parts are recognized by SedonaOffice. Parts can be mapped in the Accounting Interface the Mappings Tab as shown below. Selection of multiple WeSuite parts for mapping to one SedonaOffice part is possible. If all parts are stored in the SedonaOffice database exclusively, no mapping is required.

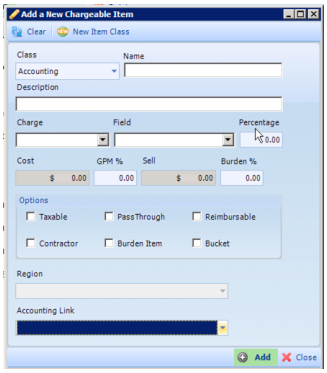


Mapping Chargeable or RMR Items: In cases where Chargeable and/or RMR Items are configured in WeEstimate, those items should be mapped to an appropriate Invoice Item in SedonaOffice for streamlining the Accounting Exception process at job export. Mapping allows these items included on "won" Estimates to be correctly associated with the appropriate invoice item in SedonaOffice. Mapping items is only required to be done one time.

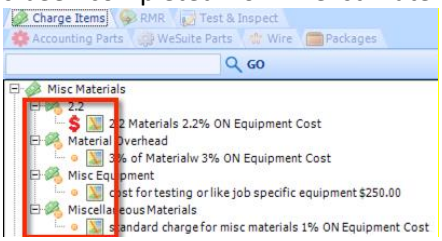
Option for Mapping of Chargeable Items and RMR Items defined in WeSuite:

Chargeable Items and RMR Items defined in WeEstimate may be mapped at the time they are defined in the Chargeable Items or RMR Items Editors. Below are screen shots of the WeEstimate RMR Items and the Chargeable Items Editors. RMR and Chargeable Items are created in these Editors in WeEstimate.



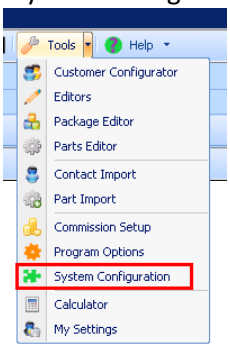


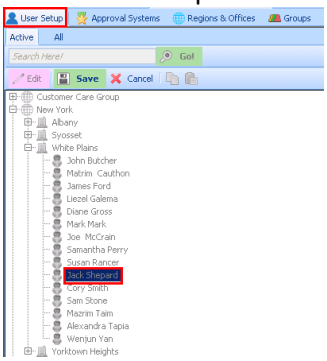
After items are mapped, a map icon will appear next to each item in the Mapping Tool and at the Estimate screen, indicating that mapping has been completed from WeEstimate to Invoice Items in SedonaOffice.



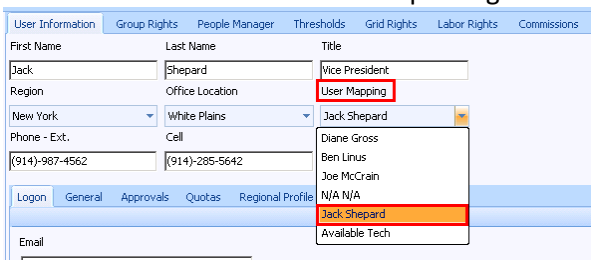
Please note: If an item, whether an RMR, Charge Item or Part on a job has not been mapped, it will be flagged as an exception when the Accounting Import process is implemented. At that time, the system will indicate all items that are not recognized by SedonaOffice until each is resolved. After each mapping item is resolved, the Accounting Import process can be completed. (See import process further in this document).

User Configuration Mapping: WeSuite Users can be mapped to their User Code/Name in SedonaOffice. At Tools (WeEstimate), select System Configuration, then the User Setup Tab.





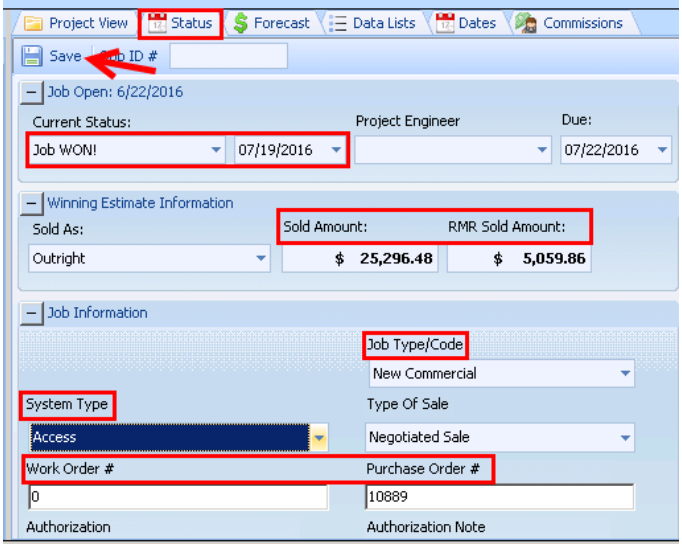
At User Setup, select the Region, Office and finally, the User to be mapped. Edit the User Profile and at the User Mapping field select the User's name from the drop down. The drop down is the list of Users from SedonaOffice. This mapping maps the WeSuite User to the User Name and Code within SedonaOffice. The User Code will show in the Sales Person field in Job creation process and other locations where the Salesperson field is present in SedonaOffice. Click save after updating.



Please Note: The Accounting Exception check performed within WeSuite is a means by which the included data elements on the won Estimate/job, are validated prior to the export of information from WeSuite, for import by SedonaOffice. The actual job import of data and creation of the Job is completed by SedonaOffice.

Preparing "won" Estimates/Jobs for Import: Open the Estimate/Job to be exported from WeEstimate and imported by SedonaOffice. The job must be in a "Job Won!" status before the Accounting Tab (for export/import process) will appear. Depending on system configuration, some systems may automate Job Won status by use of a Post-Sale Approval System in WeSuite. For others, the Estimate/job needs to be moved into "Job Won!" status.

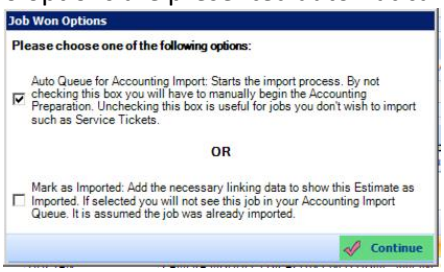
At the Estimate screen, click the Status Tab. At the Current Status drop down, select Job Won! The sold date will show as the current date. If the job was won on a prior date, use the calendar date selector to set the sold date. This is important as after "save" is selected for a Job Won status, the Estimate is locked down and cannot be changed without User rights to do so. Additionally, prior to selecting "Save", verify auto-completed field information and complete remaining fields as needed, such as: selection of Job Type, System Type, Type of Sale, Word Order #, Purchase Order #, Authorization and Authorization Note. Please note: Job Type and System Type may be changed at the Accounting Exceptions screen as needed even if pre-selected here.



The information highlighted in "red" is provided to SedonaOffice as part of the Accounting Export process. When ready, select the "job won" status for this sale and click "Save".

Multiple Proposal Revisions: If multiple quotes/proposals for the same Estimate were sent/printed from WeEstimate, the User will be provided with a window to select the "winning" quote prior to marking a job as "won".

After the job is saved as "won", two options are presented automatically.

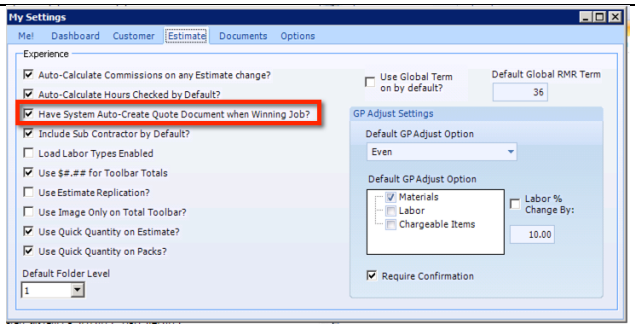


Auto Queue for Accounting Import: This option is selected by default, as it is most common. This selection automates the "won" Estimate/job into the Accounting Import Queue in WeEstimate.

Mark as Imported: There are times when it is desired to create the job manually in the accounting system however, proper linking from WeSuite is still required. The "Mark as Imported" is used for these situations. This will mark the Estimate/Job in WeSuite as "Imported" for proper linking of WeSuite jobs to Accounting and reporting purposes in WeSuite.

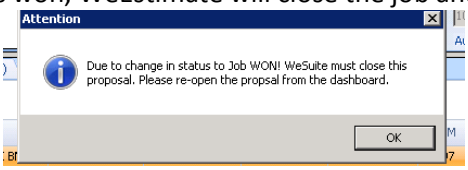
The User will make the appropriate selection and click "Continue". The current Estimate/Job will be closed and saved in a locked position. The Estimate/Job is now officially "won" in WeEstimate. A time and date stamp for the "won" status is recorded and will show at the WeEstimate URG for the Estimate.

Please note: My Settings: If a User has enabled "Have System Auto-Create Quote Document when Winning Job?" in My Settings, the step described above is not required.



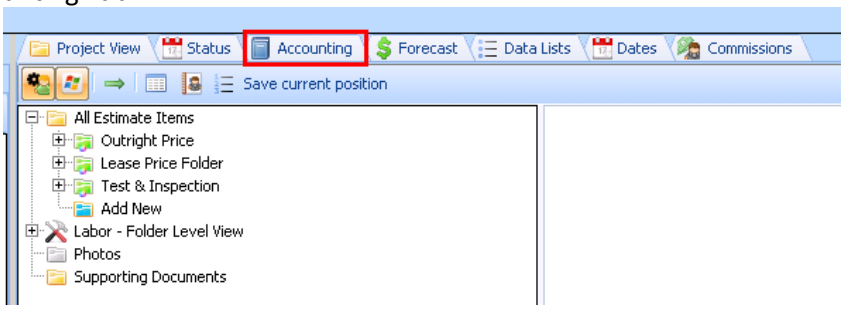
Please Note: Estimate Screen - One Time Part Addition: When Users add one-time parts (a part that did not come from the SedonaOffice database) to Estimates, after the job is won and during the Accounting Exception check in WeSuite, those parts will be flagged as exceptions. Part Exceptions require either a) entry and activation of each part in the SedonaOffice inventory prior to continuing the export process, or b) mapping of each part during the exception check to a like or same part in SedonaOffice. Please remember: one-time parts are not saved to the WeSuite or SedonaOffice database for future use.

After the Estimate/Job is saved as won, WeEstimate will close the job and save it in a locked position.

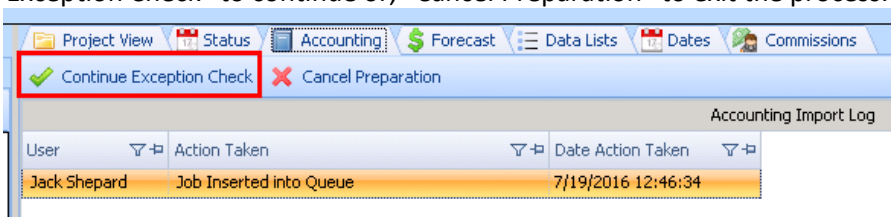


Job Export Process From WeEstimate:

After an Estimate is marked as "won", the person/people responsible for the Job export/import process, the "Accounting Export" process are automatically notified via email from WeSuite. After logging into WeEstimate and opening the "winning" Estimate, at the Estimate Screen the User performing the process will click the Accounting Tab.

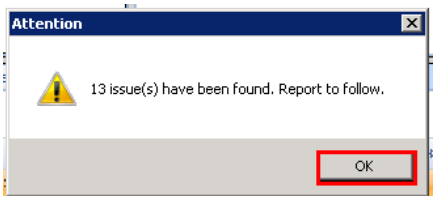


Click "Continue Exception Check" to continue or, "Cancel Preparation" to exit the process.



Please note: the Estimate provides indication of current status of the Job regarding export Started and not complete, or Complete. Also that it is in "Read Only" status because it has been won. See lower area of the Estimate screen.

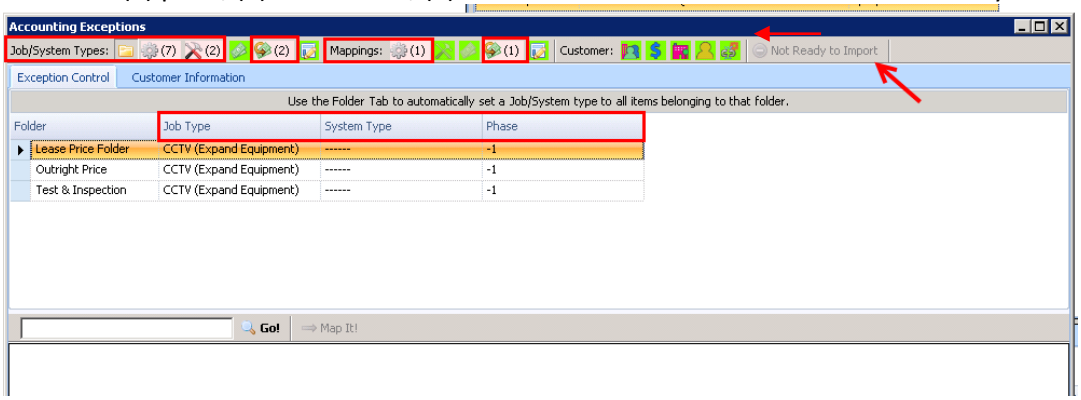
After clicking "Continue Exception Check", WeEstimate provides notification of any issues requiring resolution before the job can be inserted into the Job Management queue in SedonaOffice. In this case, 13 issues require resolution. Click Ok.



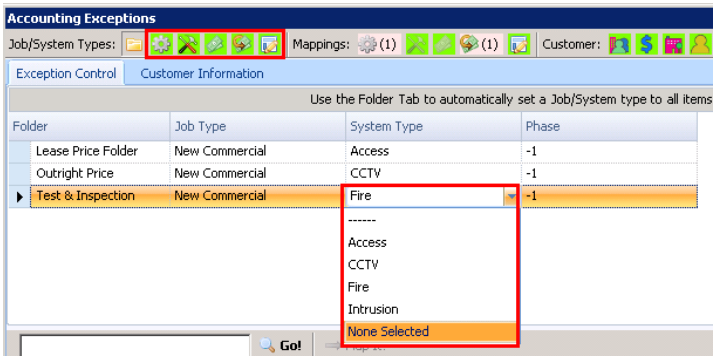
WeEstimate will show the issues to be resolved and provide a tool for resolution.

Accounting Exceptions:

The icons at the top line indicate issues in need of resolution. Each icon represents a required item for the job to be imported by the accounting system. Any icon not "green" requires resolution. In this example, the first requirement is to select a Job Type and System Type for each line. This will resolve the Job/System Types shown for: (7) parts, (2) labor items, (2) RMR items. Notice the indication "Not Ready for import".

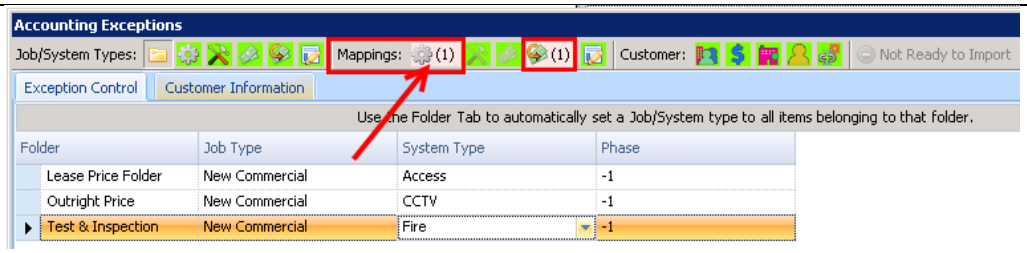


First select the Job Type and System Type for each line item. The line items shown are the names of the "Folders" the User created in the Estimate. An Estimate can be brought in as one Job by selecting the same Job Type and System Type for all line items. Alternatively, if a different Job Type and/or System Type is selected for the line items, the Estimate will come into SedonaOffice as a job that can be invoiced per Job Type/System Type comibination.

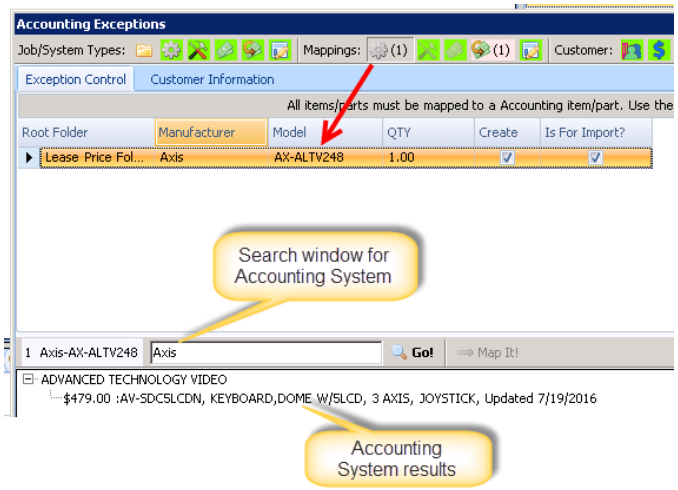


The selection of Job Type and System Types cleared the Job/System Type exceptions. Notice they are all now "green".

Next, the Mapping resolution for (1) Part and (1) RMR item needs to happen. Click on the icon.

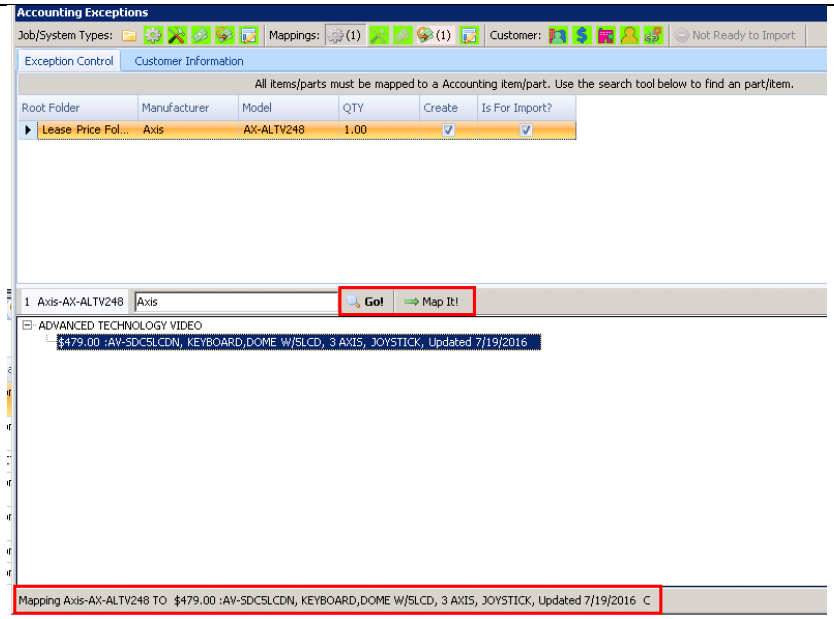


The exception item will show at the upper portion of the screen. The search window will be auto-filled with the part manufacturer. An auto search on the Accounting System happens and results are shown from the accounting system in the area below the search window.

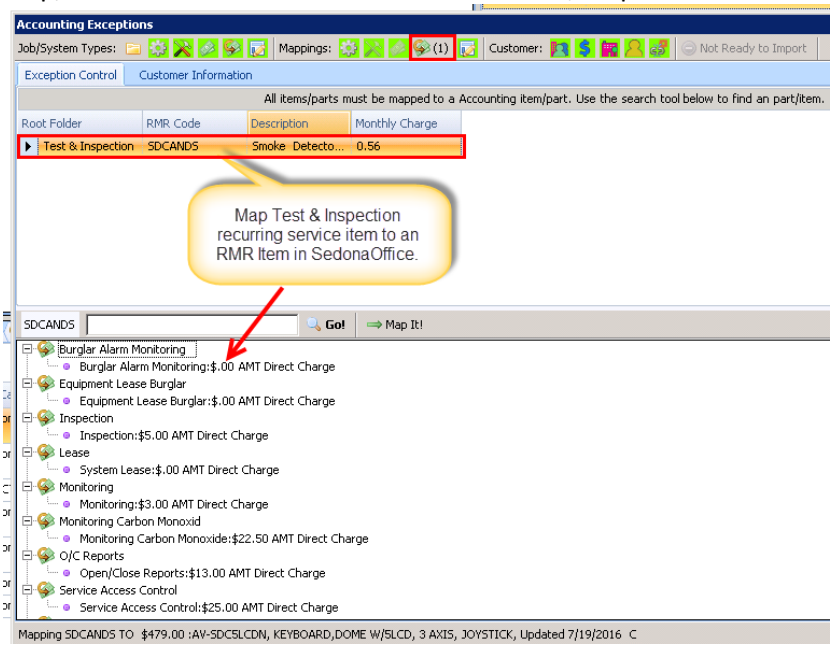


If the search results include an item the exception item can be mapped to, click the row of the exception item, click the desired item in the search results and then click “Map It!”. Map It! Comes alive after the mapping items are selected.

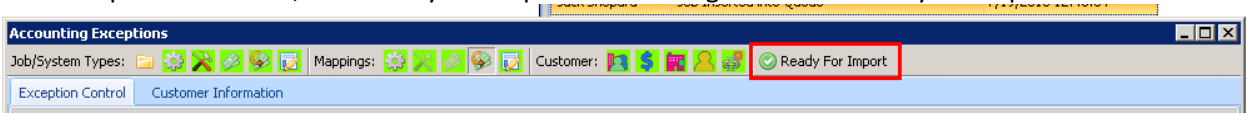
For One Time Parts added to Estimates, WeEstimate will flag each part as an exception as seen in the example above. Most often it is best to stop, go into SedonaOffice, create the new part and then continue the exception check or map the part in the Accounting Exception window during the import. Once the part(s) are in SedonaOffice inventory, the mapping only needs to be completed once. New parts will be available as well for search and use on new Estimates.



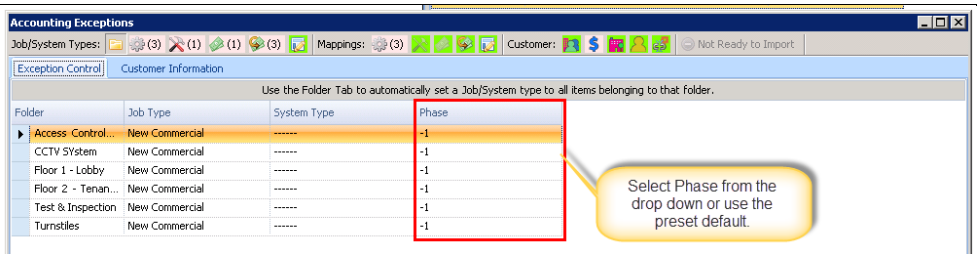
The example below shows mapping of a WeSuite recurring service item to an existing RMR service item in SedonaOffice. The same principal applies: if the RMR item from WeSuite does not exist in SedonaOffice a best practice is to stop, create the new RMR item in SedonaOffice, map the two items and then continue.



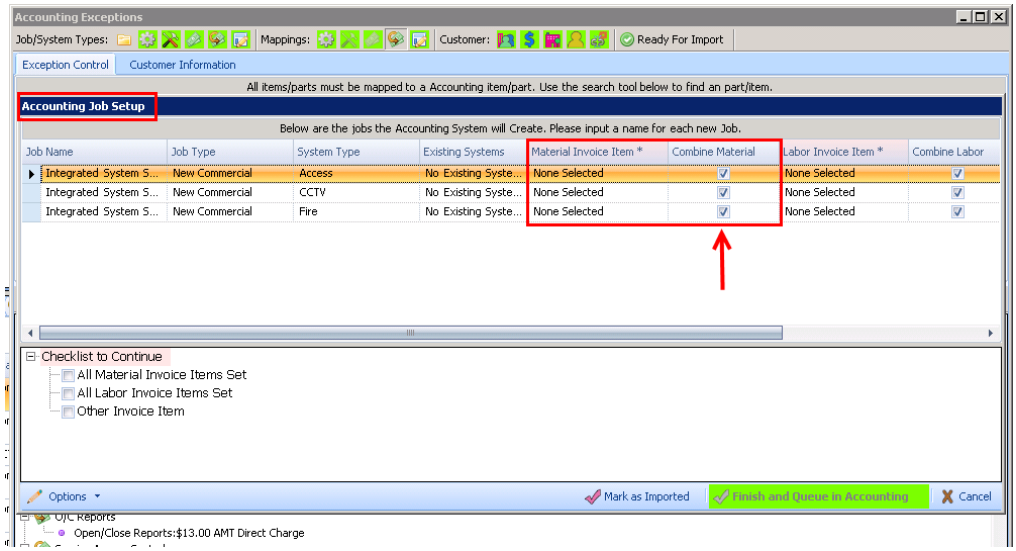
Once exceptions are clear, the “Ready For Import” button is green. Click Ready for Import.



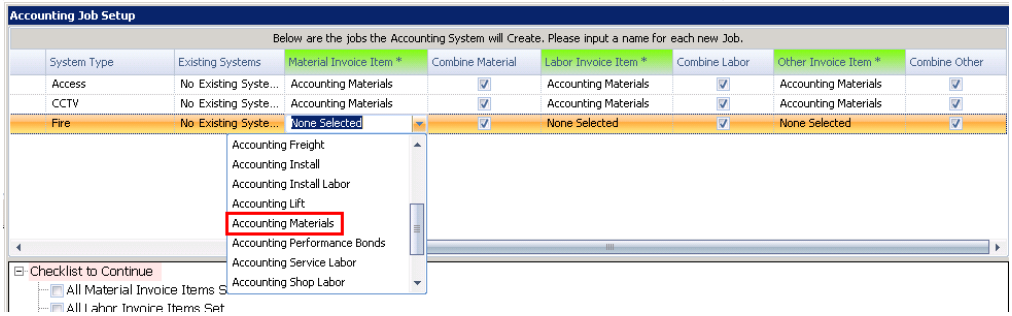
Option - Select the Job Phase: the Job Phase will either be pre-set with the default selected in the Accounting Interface or, if none selected, will show as -1. From the drop down, select the Phase for each line item as required.



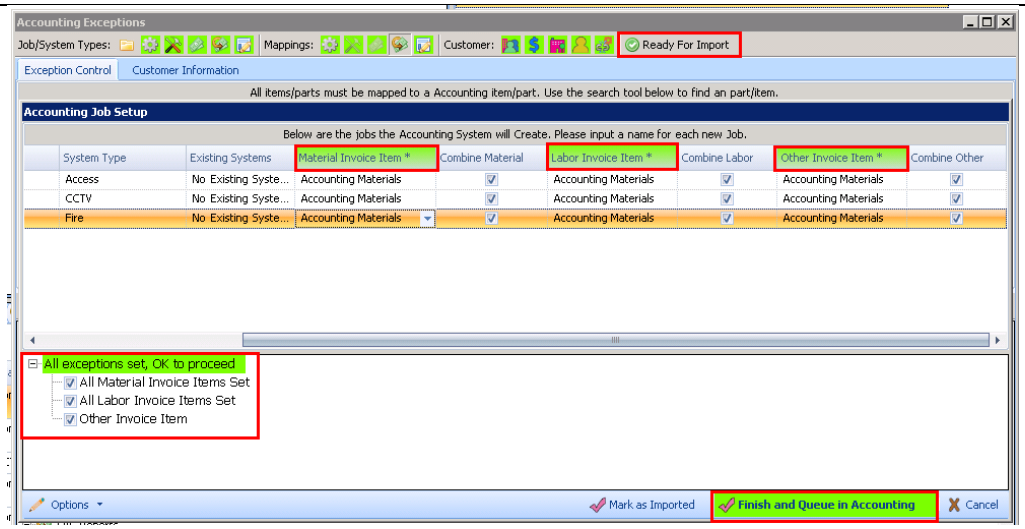
The final screen of the import process requires selection of a Material Invoice Item. In this case, the setting for Combined Invoice Item is on. Users may deselect this and select individual Invoice Items for each: Material, Labor and Other if desired. Because the settings in Accounting Appearances in this example are to combine the items to one Invoice Item, the User may make the drop down selection once and it will autofill the other columns.



The image below shows selection of a Material Invoice Item and auto-fill of Labor and Other Invoice Item columns. (This because of the "Combine Material" check box selection).



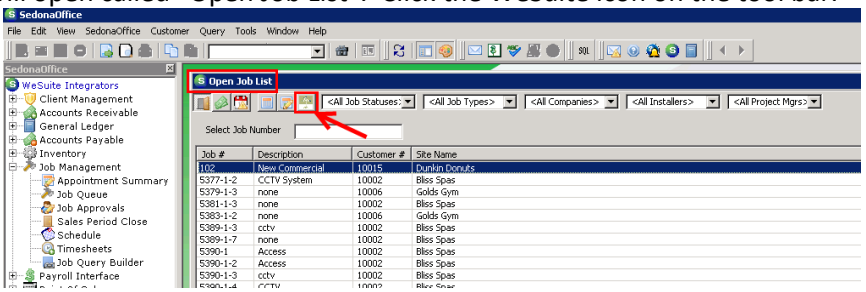
After selections are made, the Invoice Item columns and "All exceptions set" area turn green and the "Finish and Queue in Accounting" button is active. To proceed, click "Finish and Queue in Accounting".



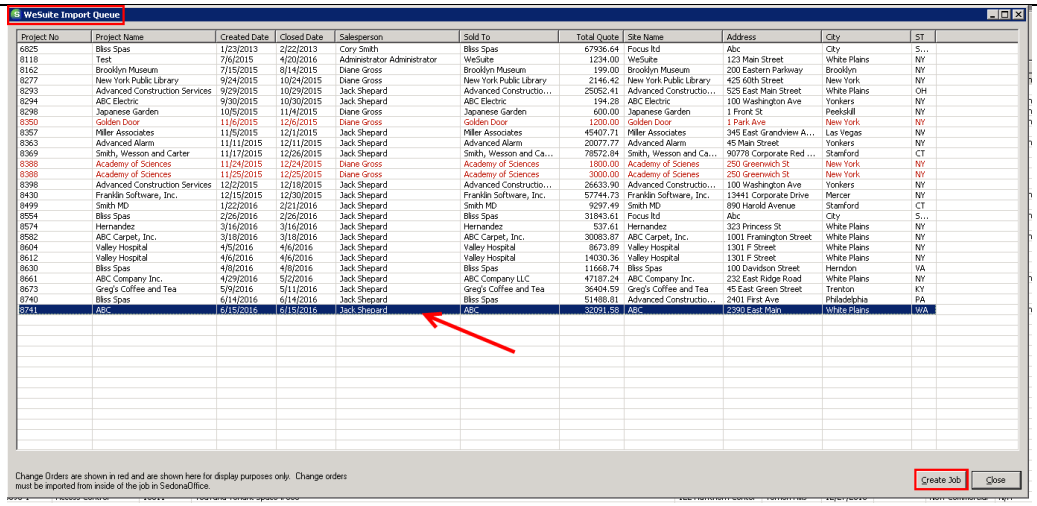
SedonaOffice Job Creation:

Importing & Creation the Job in SedonaOffice: Log into SedonaOffice. Click on Job Management and under that, click the Job Queue.

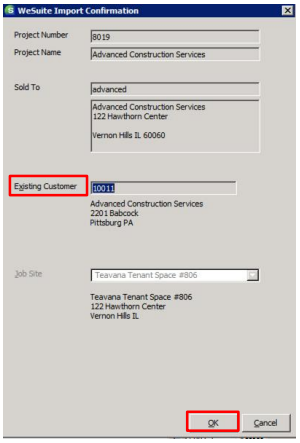
A new window will open called “Open Job List”. Click the WeSuite icon on the tool bar.

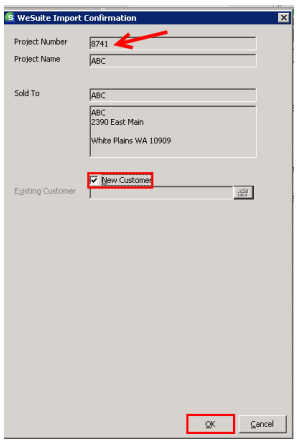


The WeSuite Import Queue will open. The most recent imported Estimates are at the bottom of the list. Click on the Estimate/job to import. Click “Create Job”.

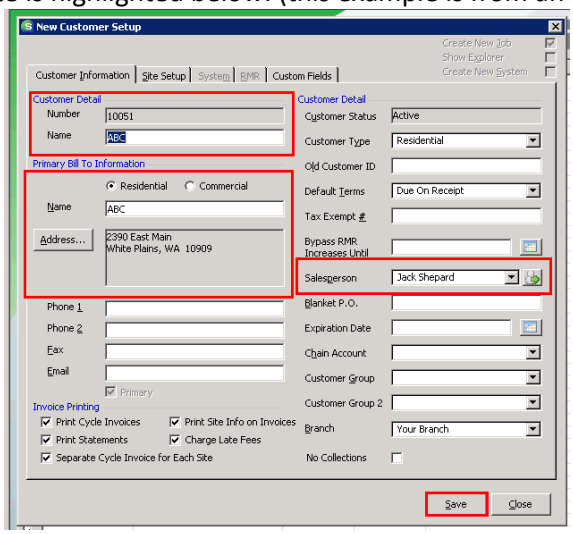


The SedonaOffice Job creation screen appears. In the examples below, one shows creation of a job for an Existing Customer, the other for a New Customer. Click OK to continue.

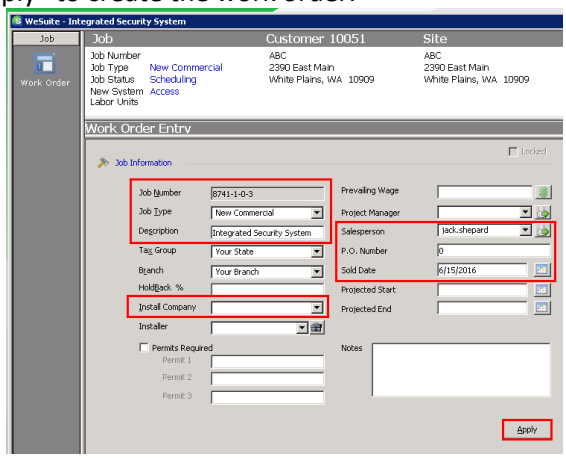




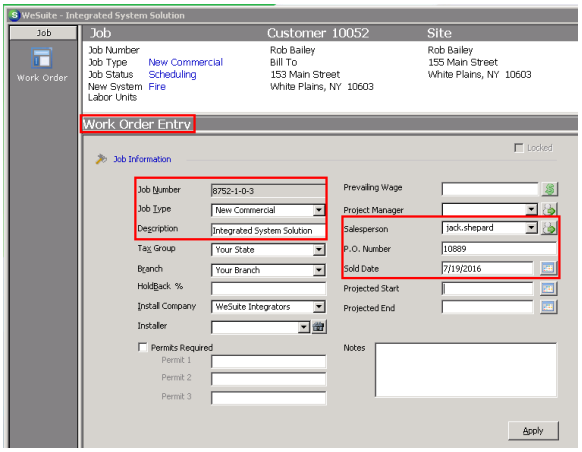
Job Information from WeSuite is highlighted below: (this example is from an Existing Customer).



The Work Order Entry screen shows. Information from WeEstimate is included: Job Number, Job Type, Description (Job Title from WeEstimate), Sales Person name, PO Number (if included by the WeEstimate User), Sold Date (as recorded in WeEstimate). Complete the remaining required information and select "Apply" to create the work order.

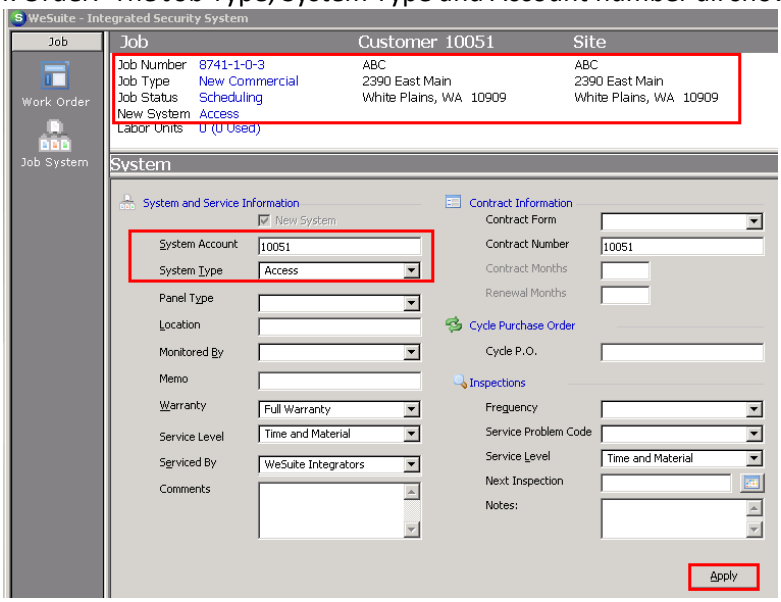


Example 1

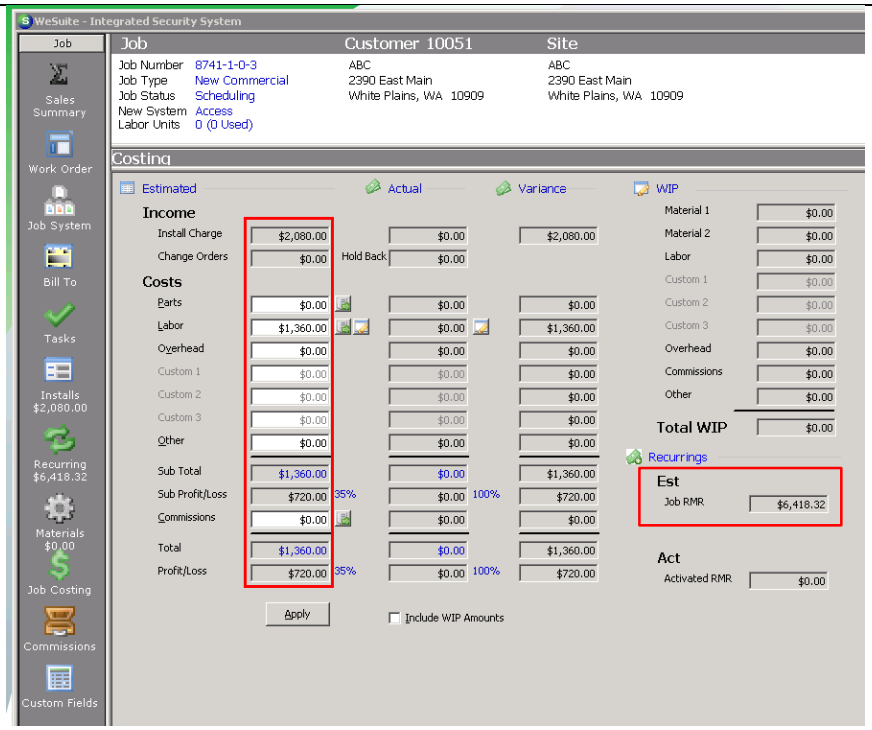


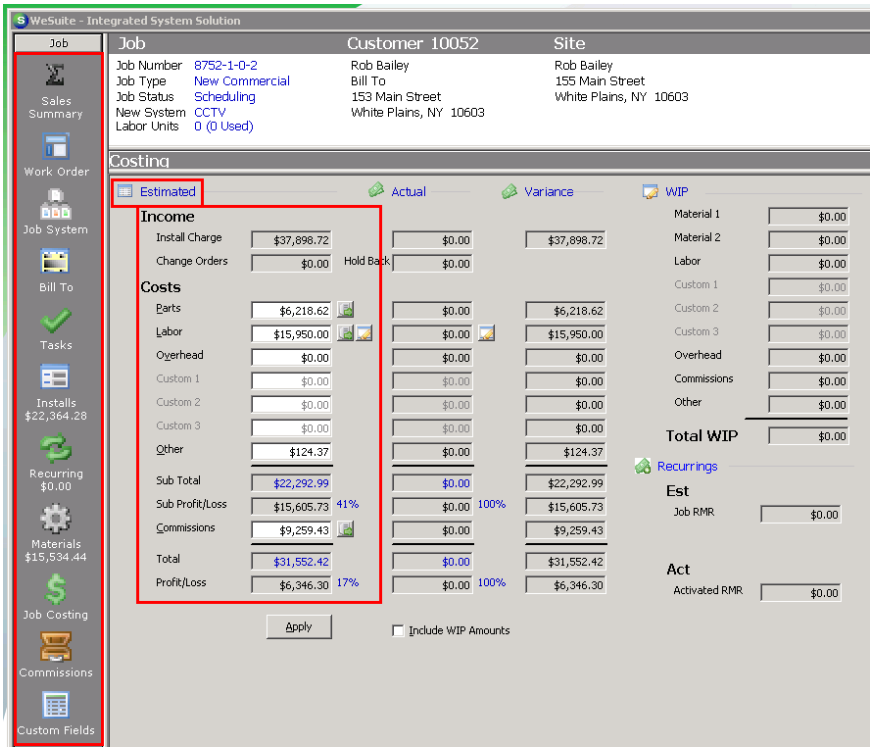
Example 2

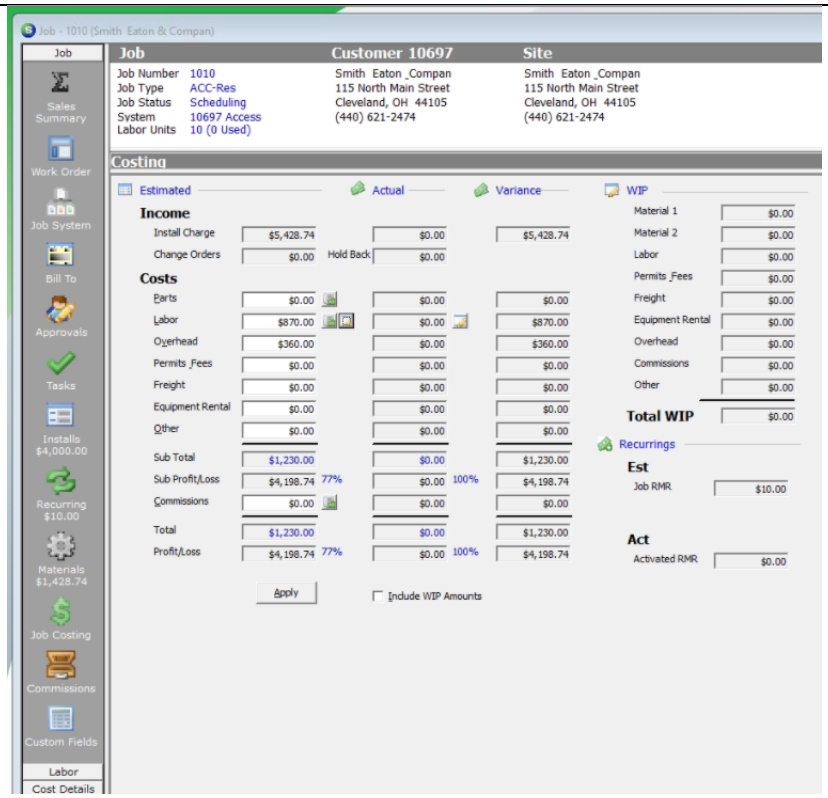
The new Work Order is created. The Job Number from WeEstimate shows and indicates (3) jobs are being created for this Work Order. The Job Type, System Type and Account number all show. Click "Apply".



Job Screen: Information from WeEstimate is shown in the Estimated column. Two examples are shown below. The estimate information is shown at the Estimated column as shown below.

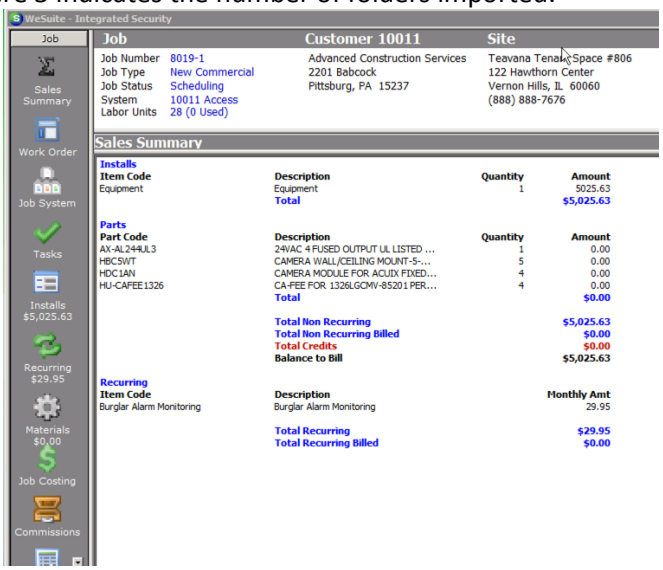

WeSuite - Integrated Security System
Job
Sales Summary
Work Order
Job System
Bill To
Tasks
Installs $2,080.00
Recurring $6,418.32
Materials $0.00
Job Costing
Commissions
Custom Fields
Job
Job Number 8741-1-0-3
Job Type New Commercial
Job Status Scheduling
New System Access
Labor Units 0 (0 Used)
Customer 10051
ABC
2390 East Main
White Plains, WA 10909
Site
ABC
2390 East Main
White Plains, WA 10909
Costing
Estimated
Actual
Variance
WIP
Income
Install Charge $2,080.00 $0.00 $2,080.00
Change Orders $0.00 Hold Back $0.00
Costs
Parts $0.00 $0.00 $0.00
Labor $1,360.00 $0.00 $1,360.00
Overhead $0.00 $0.00 $0.00
Custom 1 $0.00 $0.00 $0.00
Custom 2 $0.00 $0.00 $0.00
Custom 3 $0.00 $0.00 $0.00
Other $0.00 $0.00 $0.00
Sub Total $1,360.00 $0.00 $1,360.00
Sub Profit/Loss $720.00 35% $0.00 100% $720.00
Commissions $0.00 $0.00 $0.00
Total $1,360.00 $0.00 $1,360.00
Profit/Loss $720.00 35% $0.00 100% $720.00
Apply
Include WIP Amounts
Material 1 $0.00
Material 2 $0.00
Labor $0.00
Custom 1 $0.00
Custom 2 $0.00
Custom 3 $0.00
Overhead $0.00
Commissions $0.00
Other $0.00
Total WIP $0.00
Recurrings
Est
Job RMR $6,418.32
Act
Activated RMR $0.00


WeSuite - Integrated System Solution
Job
Sales Summary
Work Order
Job System
Bill To
Tasks
Installs $22,364.28
Recurring $0.00
Materials $15,534.44
Job Costing
Commissions
Custom Fields
Job
Job Number 8752-1-0-2
Job Type New Commercial
Job Status Scheduling
New System CCTV
Labor Units 0 (0 Used)
Customer 10052
Rob Bailey
Bill To
153 Main Street
White Plains, NY 10603
Site
Rob Bailey
155 Main Street
White Plains, NY 10603
Costing
Estimated
Actual
Variance
WIP
Income
Install Charge $37,898.72 $0.00 $37,898.72
Change Orders $0.00 Hold Back $0.00
Costs
Parts $6,218.62 $0.00 $6,218.62
Labor $15,950.00 $0.00 $15,950.00
Overhead $0.00 $0.00 $0.00
Custom 1 $0.00 $0.00 $0.00
Custom 2 $0.00 $0.00 $0.00
Custom 3 $0.00 $0.00 $0.00
Other $124.37 $0.00 $124.37
Sub Total $22,292.99 $0.00 $22,292.99
Sub Profit/Loss $15,605.73 41% $0.00 100% $15,605.73
Commissions $9,259.43 $0.00 $9,259.43
Total $31,552.42 $0.00 $31,552.42
Profit/Loss $6,346.30 17% $0.00 100% $6,346.30
Apply
Include WIP Amounts
Material 1 $0.00
Material 2 $0.00
Labor $0.00
Custom 1 $0.00
Custom 2 $0.00
Custom 3 $0.00
Overhead $0.00
Commissions $0.00
Other $0.00
Total WIP $0.00
Recurrings
Est
Job RMR $0.00
Act
Activated RMR $0.00

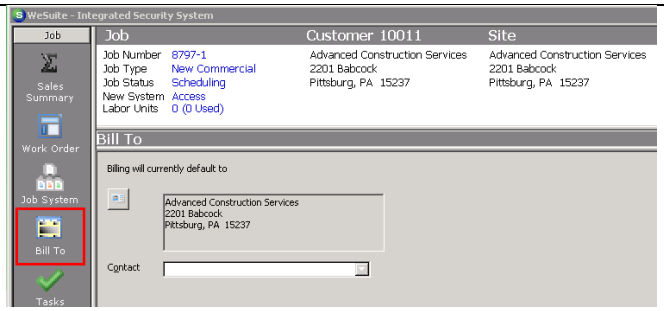


Clicking on the icons on the left Job Information pane enables viewing of detailed information for the job.

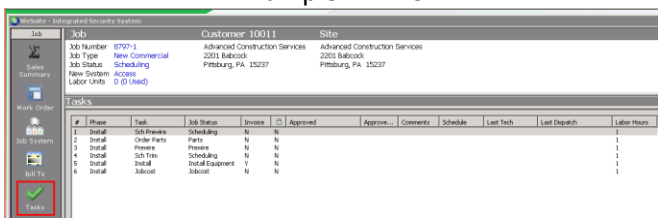
In cases where multiple Folders were imported from WeEstimate for a single job, as you close each "Job" screen, the next Folder will show until each Folder has been included. In the example on the left above (3) job folders were brought in because the Job Type and System Type selected for import varied. The Job Number 8741-1-0-3, where 3 indicates the number of folders imported.



Example: Sales Summary



Example: Bill To



Example: Tasks

This concludes the final step in the accounting import.

For more information on job configuration, setup and management in SedonaOffice, please contact SedonaOffice directly. This guide is meant to provide an overview of the workflow process from WeSuite to SedonaOffice.

BONUS!

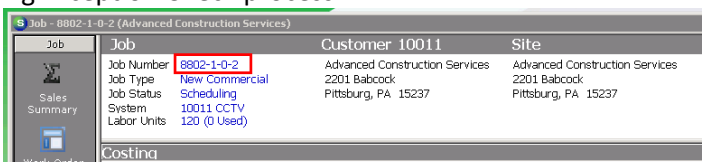
What Information does WeSuite read from SedonaOffice?

- **Customer Name:** WeOpportunity, WeEstimate, QuoteAnywhere
- **Customer Number:** WeOpportunity, WeEstimate, QuoteAnywhere
- **Site Address:** WeOpportunity, WeEstimate, QuoteAnywhere
- **Billing Address:** WeOpportunity, WeEstimate, QuoteAnywhere
- **Contact Name:** First and Last Name, Title, Address, Phone, Mobile, email address; WeOpportunity, WeEstimate, QuoteAnywhere
- **Job Type:** WeOpportunity, WeEstimate, QuoteAnywhere
- **System Type:** WeOpportunity, WeEstimate, QuoteAnywhere
- **Inventory Parts:** WeEstimate, QuoteAnywhere
- **Chargeable Items:** WeEstimate
- **RMR Items:** WeEstimate, QuoteAnywhere

What WeSuite Information Transfers from WeSuite to SedonaOffice?

The following information captured in WeSuite is provided to SedonaOffice for Job creation in SedonaOffice:

- **WeSuite Job Number:** the WeSuite job number (i.e. 8802-1-0) is showing in SedonaOffice as 8802-1-0-2. The "2" designates more than one Job or System Type has been applied to the won Estimate during the Accounting Exception Check process.



- **Customer Name**
- **Site Address**
  - **Location**
- **Billing Address**
  - **Location**
- **Main Point of Contact:** First and Last Name, Title, Address, Phone, Mobile, email address
- **Job Type:** The Job Type(s) selected for each Estimate at the Folder levels are transferred during the export process. A different Job Type may be selected for each Folder created in the Estimate. Please note: the Folder Level that contains the Parts, Labor, Chargeable Items and RMR Items is the most important selection, as this is the information utilized by SedonaOffice in job creation.
- **System Type:** The System Type(s) selected for each Estimate at the Folder levels
- **Sales Person's Name:** See mapping from System Configuration, User level, User Name in WeSuite.
- **Sold Date:** WeSuite sold date (the date the Job was saved as "Job Won" status) shows in SedonaOffice at the Job level.
- **Job Title:** shows as Description in SedonaOffice.
- **Bill of Materials Items:** quantity of each item, cost and sold price per part, item with manufacturer, model and description.
  - **Folder Levels:** as define in each Estimate by the User
- **Labor Categories**: hour quantities per WeSuite category on each Estimate/Job, as mapped to Labor Invoice Items in SedonaOffice.

- **Chargeable Items:** included Chargeable Items on the Estimate; quantity, cost and sell dollar amount of each item. (Mapping of items defined in WeSuite is required.)
    - **Note:** specific Chargeable Items can be mapped to specific SedonaOffice Invoice Items (i.e. Permits, Freight, Equipment Rental)
- **RMR Items:** included RMR Items on the Estimate, Item Code, Item Description, Term (in months), Billing Frequency, RMR dollar amount, RAR dollar amount, total term dollar amount. (Mapping of items defined in WeSuite is required.)
- **Test & Inspection Items:** if saved as "Outright" move to SedonaOffice as part of the total Outright Sale. If saved as "RMR", move to SedonaOffice as a lump sum Test & Inspection item from the RMR grid in WeEstimate. Configuration and management of Test & Inspection items within SedonaOffice is required after job creation in SedonaOffice.
- **Total Outright Sale Dollar Amount**
- **Total Recurring Revenue Sale Dollar Amount**
- **Offset Amount**
- **PO #:** entered and saved by the User at the Status Tab, Purchase Order # window prior to export.
- **Work Order #:** entered and saved by the User at the Status Tab, Work Order # field prior to export.
- **WeEstimate Notes:** as entered and saved at the Notes Tab: Sales, Finance, Engineering, Operations, Support, Test & Inspection. Notes entered and saved at these tabs within an Estimate move to SedonaOffice Job Management.
- **Commission Amount:** the total commission amount from WeEstimate (requires use of the WeSuite Commission Management System Module).
- **Change Orders:** the "positive" dollar totals and items on a winning Change Order from WeEstimate will be taken by SedonaOffice. Management of negative items/dollar amounts is completed by Administrators within SedonaOffice.
- **Job Phases:** as defined during the Estimate/Job export process.

Conclusion:

For support services, please either contact WeSuite Support at wesupport@wesuite.com or visit the WeSuite website at www.wesuite.com. Go the Support page and click "Submit a Ticket".

Thank you for purchasing and using WeEstimate. We hope that this Reference Guide has been helpful to you. We continually strive to improve our documentation and support services. Please forward any comments, questions and ideas to info@wesuite.com.

WeSuite
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