

# Custom Job Costing Buckets Setup

06/14/2024 9:16 am EDT

The job custom costing buckets have their own setup tables. To use the job custom costing buckets follow the steps below.

1. Navigate to SedonaSetup – Setup Processing (JM)
2. Select the Custom Job Buckets tab
3. Name the buckets, assign a WIP account to them if desired, and Apply.
4. Navigate to SedonaSetup - Job Expense Types
5. Select New
6. Name the new expense type, check the box for WIP if desired, and assign it to one of the custom job costing buckets.

Note – do not use an existing expense type. A new expense type must be created.

The new expense type can now be used on expenses, and the associated costs will flow through the new custom bucket in the job costing tab of each job.

**Sedona Office Setup (SedonaSecurity)**

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**Sedona Setup**

| Description                       | Area      |
|-----------------------------------|-----------|
| Custom Fields Table3(Part)        | IN        |
| Customer Part Groups              | IN        |
| Inventory Setup                   | IN        |
| Manufacturer                      | IN        |
| Material Handlers                 | IN        |
| Part Labor Unit Desc              | IN        |
| Product Line                      | IN        |
| Warehouses                        | IN        |
| Commission Types                  | JM        |
| Contract Forms                    | JM        |
| Custom Fields Setup (Job)         | JM        |
| Custom Fields Table1 (Job)        | JM        |
| Custom Fields Table2 (Job)        | JM        |
| Custom Fields Table3 (Job)        | JM        |
| Custom Fields Table4 (Job)        | JM        |
| Install Companies                 | JM        |
| Installers                        | JM        |
| Job Approval Group                | JM        |
| Job Expense Types                 | JM        |
| Job Phases                        | JM        |
| Job Statuses                      | JM        |
| Job Tasks                         | JM        |
| Job Types                         | JM        |
| Labor Tasks                       | JM        |
| Prevailing Wages                  | JM        |
| <b>Setup Processing</b>           | <b>JM</b> |
| Alarm Companies                   | OP        |
| Central Station Tracking Defaults | OP        |
| Company Edit                      | OP        |
| Default Vendor                    | OP        |
| Departments                       | OP        |
| Document Type                     | OP        |
| Employees                         | OP        |
| Geographic Tables                 | OP        |
| Integration Setup                 | OP        |
| Note Type                         | OP        |

**Job Processing**

Setup Processing Custom Job Costing Buckets Define Initial View

**Custom Bucket 1**

Description: Subcontractor

☒ Use WIP

WIPAccount: 122125

**Custom Bucket 2**

Description: Freight

☒ Use WIP

WIPAccount: 122140

**Custom Bucket 3**

Description: Equipment Rental

☐ Use WIP

WIPAccount: N/A

Apply

**Sedona Office Setup (SedonaSecurity)**

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| Custom Fields Table4 (Job)        | JM        |
| Install Companies                 | JM        |
| Installers                        | JM        |
| Job Approval Group                | JM        |
| <b>Job Expense Types</b>          | <b>JM</b> |
| Job Phases                        | JM        |
| Job Statuses                      | JM        |
| Job Tasks                         | JM        |
| Job Types                         | JM        |
| Labor Tasks                       | JM        |
| Prevailing Wages                  | JM        |
| Setup Processing                  | JM        |
| Alarm Companies                   | OP        |
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| Employees                         | OP        |
| Geographic Tables                 | OP        |
| Integration Setup                 | OP        |
| Note Type                         | OP        |

**Expense Types**

☒ Expense Types

| Expense Type | Description                  | Use WIP  | Custom JC Bucket |
|--------------|------------------------------|----------|------------------|
| L            | Labor                        | N        | 0                |
| M            | Material                     | N        | 0                |
| C            | Commission                   | N        | 0                |
| V            | Overhead                     | N        | 0                |
| O            | Other                        | N        | 0                |
| TX           | Tax                          | N        | 0                |
| S            | Subcontractor                | N        | 0                |
| ER           | Equipment Rentals            | Y        | 3                |
| P            | Permits & Fees               | Y        | 0                |
| F            | Freight                      | Y        | 2                |
| T            | Travel                       | Y        | 0                |
| E            | Engineering/Drafting         | Y        | 0                |
| OW           | Other WIP                    | Y        | 0                |
| AO           | Miscellaneous Expense        | Y        | 0                |
| PF           | Permits and Fees             | Y        | 0                |
| <b>SC</b>    | <b>Subcontractor Expense</b> | <b>Y</b> | <b>1</b>         |

☒ Expense Type Edit

Expense Type: SC

Description: Subcontractor Expense

Use WIP: ☒

Custom JC Bucket: 1

Apply New Delete