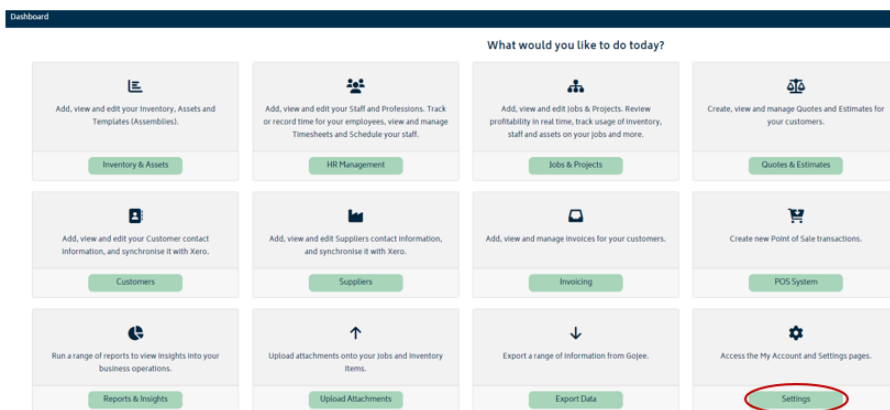


Knowledge Base



Introduction

Organisation Settings allows you to choose options for your Gojee file and configure the connection between Xero and Gojee. You can access this menu by selecting Settings from home screen:



- Click "Organisation Settings"



- You will be directed to Organisation settings page:

Edit organisation Demo Company (AU) - 24072023

GL Account Mapping Xero Branding Theme Mapping Planning Email Settings Application Features Job Task Activities Payments Resource Settings Other Settings

Open Accounts to Xero

Income Accounts

Inventory/Bill of Materials

Sales

Professional Services

Sales

Assets

Sales

Templates

Sales

Payment Accounts

Cash Payments Received

Business Bank Account

Prepayment Holding Account

Clearing Account

Note: Bank accounts will only be available if they have a valid account code set in Xero.

Save Configuration Cancel & Exit

Detail on each tab is provided below.

Note: You must hit save at the bottom of the page for your changes to take effect. If you navigate away from the tab your changes will be lost.

When configuring your account for the first time, you'll have the option to save and complete later if you're not finished selecting all the required options.

General Ledger Account Mapping

This page allows you to set your general ledger accounts to be used when Gojee sends transactions through to Xero:

Edit organisation Gojee Test Org (AU-02-2021)

GL Account Mapping Xero Branding Theme Mapping Planning Email Settings Application Features Job Task Activities Payments Resource Settings Other Settings

Open Accounts to Xero

Income Accounts

Professional Services

Sales

Assets

Sales

Templates

Sales

Payment Accounts

Card Payments Received

Business Bank

Cash Payments Received

POS Cash Sales

Prepayment Holding Account

Prepayments

Note: Bank accounts will only be available if they have a valid account code set in Xero.

Save Configuration Cancel & Exit

Income Accounts:

- This is where your job revenue will be posted to when you invoice your customers. Revenue will be split between the categories listed, based off the products/resources used in your jobs.
- You will only be able to choose Xero accounts of type Revenue/Sales for these options.

As an example, the following images illustrate how the settings in Gojee for Income accounts, flow through to the invoice created in Xero:

Select these accounts in Gojee:

Income Accounts Professional Services

Sales - Professions

Assets

Sales - Assets

Templates

Sales - Templates

Raise an invoice for a job that has charges for Professions, Assets and Templates, and it will be configured as follows in Xero:

Invoice ORC1048

Preview Email Print PDF Invoice Options

To: Bayview Club
Attention: Club Secretary
P.O. Box 3354
South Maitland Centre
RIDGE HEIGHTS MADEUPVILLE NSW 2301
AUSTRALIA
Est address

Date: 21 Sep 2023 Due Date: 21 Sep 2023 Invoice #: ORC1048 Reference: Job: J00004 Branding theme: Standard Online Payments: demo@demo-purposes... Manage

Total: 533.50

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Region	Amount AUD
	4 Pack Downlights Template	1.00	45.00		Sales - Templates	GST on Income		45.00
	Work Van	1.00	200.00		Sales - Assets	GST on Income		200.00
	Electrician	2.00	120.00		Sales - Professions	GST on Income		240.00
Subtotal								485.00
Total GST 10%								48.50
TOTAL								533.50

Note: for inventory, the sales account is set individually for each inventory item, and can be updated in bulk for items using the CSV import function.

Payment Accounts:

- These are the asset accounts where your payments will be posted in Xero, i.e. generally your bank account.
- When a payment is taken from Gojee (refer to [Deposits and Payments](#) section), a payment transaction will be created in Xero linked to the document being paid (i.e. invoice or prepayment).
- The payment account selected in this setting field will be the account that the payment is linked to as an unreconciled transaction.
- Each Payment account is explained below.
- **Please speak with your bookkeeper or accountant for advice on which account to select if you're unsure of which account to choose from the dropdown.**

Card Payments Received: Typically, this would be the bank account that Square card payments are deposited into (i.e. the bank account you nominate with Square when setting up your account with them), however you may also want to reconcile these payments into a clearing account, or some other account depending on your processes.

Cash Payments Received: Typically, this would be the bank account that you deposit your cash takings into, however you may also want to reconcile these payments into a clearing account, or some other account depending on your processes.

Prepayment Holding Account: Typically, this would be a liability account that you recognise the value of prepayments (deposits) on your balance sheet prior to invoicing your customer (i.e. an "unearned revenue" account or similar), however you may also want to reconcile these payments into an asset account, or some other account depending on your processes. The account that's selected here will show on the prepayment document created in Xero as follows:

Sales > Invoices > Prepayment ORC1047

Awaiting Payment View online invoice Email Print PDF Prepayment Options

To	Date	Invoice #	Reference	Branding Theme	Paid into	Total
7-Eleven No address Add address	21 Sep 2023	ORC1047	Gojee Payment Receipt Job J00003 Tender: cash	Standard	Business Bank Account	10.00

Description	Quantity	Unit Price	Account	Tax Rate	Region	Amount AUD
Gojee Prepayment for job J00003	1.00	10.00	Revenue Received in Advance	GST Excluded		10.00
Subtotal						10.00
Total No GST						0.00
Total Credit						10.00

Make a cash refund

Amount: 10.00 Date: Paid From: Reference: Add Refund

To illustrate how the chosen accounts flow through to the transactions in Xero, an example cash payment transaction is provided below:

Example: Set the cash payment account in Xero to “Business Bank Account” (this is a bank account set up in Xero)

Payment Accounts

Cash Payments Received

Business Bank Account

Create a payment in Gojee for an Invoice, and it will be automatically sent to Xero as per the image below:

Sales overview > Invoices > Invoice ORC1044

Awaiting Payment Preview Email Print PDF Invoice Options

To	Date	Due Date	Invoice #	Reference	Branding theme	Online Payments	Total
City Limousines 13 Waverly Park Rd MELBOURNE VIC 3113 Edit address	21 Sep 2023	28 Sep 2023	ORC1044	DEMO-INV-1	Standard	demo@for-demo.purpos... Manage	641.30

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Region	Amount AUD
	4 Pack Downlights	1.00	45.00		Sales	GST on Income		45.00
	Electrician	1.50	120.00		Sales	GST on Income		180.00
	Work Van	0.75	200.00		Sales	GST on Income		150.00
	Call Out Fee	1.00	100.00		Sales	GST on Income		100.00
	Ceiling Fan	1.00	108.00		Sales	GST on Income		108.00
Subtotal								583.00
Total GST 10%								58.30
TOTAL								641.30
Less: Payment								100.00
AMOUNT DUE								541.30

This payment will be allocated to the “Business Bank Account” as an unreconciled payment. When the funds are deposited into the bank account this transaction can be reconciled against the deposit:

Demco Company (AU) 21 Sep 23 > Dashboard > Business > Accounting > Payroll > Projects > Contacts

Business Bank Account > BALANCE: 17,896.37

Unreconciled: 4,377.17 (17,896.37) Reconcile Reconcile Payment Manage Account

Reconciled: 0 Cash coding Bank statements Account Transactions

+ New Transactions

Date	Description	Reference	Payment Ref	Spent	Received	Balance	Bank Transactions	Status
21 Sep 2023	Payment City Limousines	DEMO-INV-1 ORC1044	Gojee Payment Receipt Job J00003, Tender: cash	100.00	(17,896.37)			Unreconciled
28 Sep 2023	Payment Demco Security			75.00	(17,971.37)		Reconciled	Reconciled

Trouble shooting:

- Bank accounts will only be available to choose in this field they have a valid account code set in Xero (i.e. when setting up a bank account in Xero its not compulsory to assign an account code, and without this code Gojee cannot send the transaction to Xero).
- If you're bank account isn't showing in the list for Payment Accounts, navigate to the [chart of accounts](#) in Xero, and check that the Bank account has an account code set up as per the image below:

Advanced accounting > **Chart of accounts**

Categorise every transaction in Xero with our full [Chart of accounts](#)

Financial reports draw on each account to show how your business is performing

[Learn more about customizing the chart of accounts](#)

[Add Account](#) [Add Bank Account](#) [Print PDF](#) [Import](#) [Export](#)

All Accounts Assets Liabilities Equity Expenses Revenue Archive

What's this?

Delete Archive Change Tax Rate No accounts selected [Search](#)

<input type="checkbox"/>	Code	Name	Type	Tax Rate	YTD
<input type="checkbox"/>	090	Business Bank Account	Bank	BAS Excluded	(17,996.37)
<input type="checkbox"/>	331	Business Savings Account	Bank	BAS Excluded	6,878.28
<input type="checkbox"/>	200	Sales Income from any normal business activity	Revenue	GST on Income	49,028.32

- If a bank account was recently added into Xero, you may need to do a Sync between Gojee and Xero to pull in the latest information. Refer to [My Account](#) section for instructions to complete this, and choose to sync the "Organisation Setup" details.

Xero Branding Theme Mapping

This section allows you to set the default branding theme that will be applied when creating a new document of the types shown on this page. Currently, the branding themes will apply to quotes and invoices for Do and Charge jobs, quotes and invoices for Fixed Price jobs, purchase orders, and sales orders. Gojee uses the Xero branding themes to generate custom PDFs with your business's logo, formatting and styles. There are also special Gojee branding themes for quotes that have extra fields (expiry date, title, summary, and footer notes) and allow you to add two logos at once.

To learn more about using Xero Branding themes, please click refer to the following resources:

- [Xero Central Documentation](#) – branding themes explained
- [Step by Step Video Tutorial](#) – customising branding themes

Once you have your Xero Branding themes set up, you can simply choose the relevant branding theme for each document listed on this page:

Edit organisation Gojee Test Org (AU-02-2021)

GL Account Mapping Xero Branding Theme Mapping Planning Email Settings Application Features Job Task Activities Payments Resource Settings Other Settings

Branding Themes

Fixed Price Quotes
Quotes Gojee

Fixed Price Invoices
Standard

Time & Materials Quotes
Quotes Gojee

Time & Materials Invoices
Standard

Purchase Orders
Test New Theme

Sales Orders
Sales Order

Open Settings in Xero

Save Configuration Cancel & Exit

Note: When creating or editing Invoice, Quotes, Purchase orders etc, you will have the option to change the branding theme applied on an individual basis, as per the example below:

Reports > Invoices > Edit Invoice Feedback

Edit Invoice

Customer: Bopple Club Due Date: 28/01/2021 Reference: DEMO-INV-1

Name Qty Unit Price Discount %

Air Cond. Technician	1	80.00	
----------------------	---	-------	--

Branding Theme: Standard (highlighted in green circle)

Total Invoice: \$8,000.00 (Includes a discount of \$0.00) (Tax Excluded)

Planning

The planning sections allows you to choose your default business operating hours. This information will be used to set the width of the planning schedule for the daily view.

Simply enter a default start and stop time in the input fields as shown below:

Edit organisation Gojee Test Org (AU-02-2021)

GL Account Mapping Xero Branding Theme Mapping Planning Email Settings Application Features Job Task Activities Payments Resource Settings Other Settings

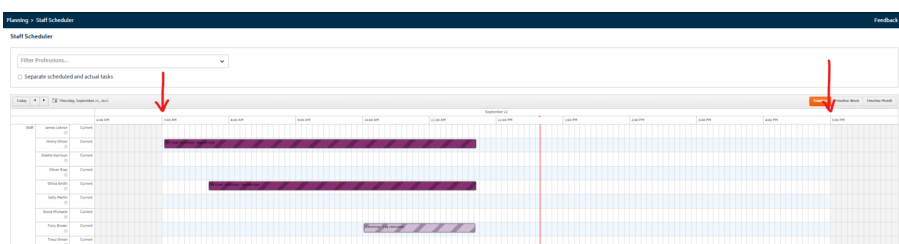
Planning

Working hours start: 07:00 AM

Working hours end: 05:00 PM

Save Configuration Cancel & Exit

For example, the settings above would result in a view on your staff scheduling page as follows:



Note: a buffer of one hour either side of the default start and finish is displayed on the calendar as shown in the image above.

Email Settings


Email settings allow you to define a contact email address for your organisation that can be bcc'd (blind carbon copied) by default when emailing quotations, invoices and purchase orders to customers from Gojee.


Simply enter an email address for your organisation reply and contact email address as shown below:


Edit organisation Gojee Test Org (AU-02-2021)

GL Account Mapping Xero Branding Theme Mapping Planning **Email Settings** Application Features Job Task Activities Payments Resource Settings Other Settings

System Email Options

Reply Email 
Test@me.com

Contact Email 
Test@me.com

Xero Organisation Sync 
☒ Sync Reports

Save Configuration Cancel & Exit

- **Reply email:** Emails sent will be configured with this reply-to email address. This means that when your customers hit “reply” on an email sent from Gojee, the email will be addressed to your your email address, and not noreply@gjeeapp.com.au. An example is provided below:

Discard Pop Out

Send

From jack@gjeeapp.com.au

To **test@me.com**

Cc

Subject RE: Invoice: ORC1044 for Scott Mercer from Demo Company (AU) 21 Sep 23

-----Original Message-----
From: Gojee Messenger Service <noreply@gjeeapp.com.au>
Sent: Thursday, September 21, 2023 1:05 PM
To: jack@gjeeapp.com.au
Subject: Invoice: ORC1044 for Scott Mercer from Demo Company (AU) 21 Sep 23

Hi Scott Mercer,

Here's invoice Xero invoice number ORC1044 for AUD 641.30.

If you have any questions, please let us know.

Thanks,
Demo Company (AU) 21 Sep 23

- **Contact email:** When sending delivery documents, this is the contact email address that gets displayed on the document, as per the example below:

Delivery Docket

Invoice To:
Bayside Club
P O Box 3354
South Maitland Centre
Ridge Heights, Maitland, NSW, 2000
Australia

Delivery To:
Bayside Club
P O Box 3354
South Maitland Centre
Ridge Heights, Maitland, NSW, 2000
Australia

Invoice Date:
2023-09-21

Invoice Number:
J00002

Reference:
J00002

Customer PO/Ref No:

Demo Company (AU) 21 Sep 23
23 Main Street
Maitland, NSW, 2000
Australia
E: test@me.com

Item Code	Description	Qty Ordered	Qty Shipped	Qty B.O
IS004	Call Out Fee	1.00 each	0.00 each	1.00 each
IS003	Reverse Cycle Split System Air Conditioner	3.00 each	0.00 each	3.00 each

- **Sync Reports:** Select whether Xero sync reports are sent to owner and administrator users. If this option is selected, a reports will be sent daily containing information on the daily sync between Xero and Gojee. The option for “sync reports” can be disabled so you do not receive a daily sync report from Gojee. An example sync report is provided below:



Xero data sync report generated on 23 Jul

2023, 00:00

Sync Summary

Name	Status	Created	Updated	Deleted	Failed
staff	verified	0	0	0	0
supplier	verified	0	0	0	0
organisation	verified	0	1	0	0
payroll-calendar	verified	0	0	0	0
customer	verified	0	0	0	0
account	verified	0	0	0	0
pay-item	verified	0	0	0	0
asset	verified	0	0	0	0
branding-theme	verified	0	0	0	0

For more details please login to the [Gojee App](#).

Thanks for using Gojee.

Organisation Add-ons

This tab provides options to turn on advanced features and modules to help you do more with Gojee. Please refer to the [Organisation Add-ons](#) page for more information.

Job Task Activities

In Gojee, there are three types of activities that can be selected when users are tracking time or entering time records. These activities define whether the time will be billable on a job, and/or billable on the worker's time sheet. Each of these activities has a default name, as detailed below:

Edit organisation Gojee Test Org (AU-02-2021)

GL Account Mapping	Xero Branding Theme Mapping	Planning	Email Settings	Application Features	Job Task Activities	Payments	Resource Settings	Other Settings
<div>Activity name <input type="text"/></div> <div><div>General</div><div>Break</div><div>Downtime</div></div> <div><div>Customer billable <input type="checkbox"/></div><div>Timesheet billable <input type="checkbox"/></div><div>Active <input type="checkbox"/></div></div>								

Save Configuration Cancel & Exit

This page allows you to quickly change the name of these activities to another name that's more applicable to your business, or makes more sense for your employees. To change one of the activity names, simply click on the text and update it. If you're comfortable with the default names, then no changes are required on this page.

Note: Refer to [Time Tracking](#) for more information on how these activities are used in Gojee when tracking time.

Payments

This tab allows you to configure a default customer for your point of sale (POS) transactions and also define your Square integration settings if the add-on has been turned on in the Add-ons tab. None of these options are required, so you can continue setting up the rest of your organisation and come back to this at any time if you'd like to use it.

When the Square add-on is enabled, the page will look as follows:

Edit organisation Gojee Test Org (AU-02-2021)

GL Account Mapping Xero Branding Theme Mapping Planning Email Settings

Application Features Job Task Activities **Payments** Resource Settings Other Settings

Select POS Customer ?

Cash Sale Account

Square Configuration

Application ID (Customer ID) ?

sq0idp-----Q

Access Token ?

.....

☐ Sandbox (Testing) Account

Seller Account

Test

Refresh Square Seller Accounts

Payments Support Email

test@me.com

Save Configuration Cancel & Exit

POS Customer:

Select any of your existing customers from the dropdown list. If you need to create a new customer, refer to [Customers](#) section for details on how to do this. You can save and navigate away from this page, create the new customer, and then come back to select it.

Square Configuration:

Please see the [Square Payments](#) article for more information on how to configure this section.

Resource Settings

This section enables you to configure different aspects of your resources. These settings are optional and some standard defaults will be applied if no changes are made. Please review the details of each section below:

GL Account Mapping Xero Branding Theme Mapping Planning Email Settings Application Features Job Task Activities Payments **Resource Settings** Other Settings

Inventory Locations

[Add](#)

Name	Description
Wh1	Back Room
1-Cairns	Cairns Office CNS
2-Townsville	Townsville Office TSV
Wh2	Front Room
DEFAULT	

Quote Visibility

☒ Show resources as visible on quotes by default

Delivery Addresses

[Add](#)

Label	Attention to	Contact number	Address	Source	
-	-	-	8-10 Smith St, RYDE, NSW, 2112, Australia	Xero	
-	-	-	8-10 Smith St, RYDE, NSW, 2112, Australia	Xero	
manual	1	2	Flinders Street, Melbourne, VIC, 3004, Australia	Gojee	<input checked="" type="checkbox"/>
manual 2	2	3	Airport Drive, Brisbane Airport, QLD, 4008, Australia	Gojee	<input checked="" type="checkbox"/>
manual 2	2	3	Airport Drive, Brisbane Airport, QLD, 4008, Australia	Gojee	<input checked="" type="checkbox"/>
spaces spaces	1	2	367 Collins Street, Melbourne, VIC, 3000, Australia	Gojee	<input checked="" type="checkbox"/>

Purchase Order Description

☒ Show item code & item name

☒ Show item description

☒ Show supplier sku & supplier sku name

Goods Receipt

☒ Automatically consume items onto the job when receiving goods.

[Save Configuration](#) [Cancel & Exit](#)

Inventory Locations:

- If you have tracked inventory items, you can assign your items to locations and track their movements when in stock up until the point they are consumed on a job.
- You can create an unlimited amount of locations in Gojee to manage your stock.
- To add a new location, simply click the Add button at the top right of this section. Enter a name (required) and description is necessary (not required).
- You can remove a location if no items exist in the location by clicking the (x) at the end of the row.
 - If no (x) is available, it means there are items in stock in this location.
- Make sure you hit save at the bottom of the page prior to navigating away.

Quote Visibility:

- If this option is selected then assets, professions and inventory added to the bill of material pages for jobs will all show on quotes by default.
- This is only a default setting, when creating a quote you can choose to change individual line items to be visible or not, regardless of the option chosen here.
- Note: inventory defaults can be set individually in the [inventory edit](#) page, and that will override this setting where they exist.

Delivery Addresses:

- Delivery addresses you have already set up in Xero will be synced into Gojee by default. These will be identified with the source column showing “Xero”.
- In xero, the delivery addresses can be modified here:
 - Go to [Xero Organisation Settings](#)
 - Select “Organisation Details”
 - Scroll down to the contact information section and there will be two address options:

Contact Information

Postal address

Search address

56 Jones St

Armidale

NSW2350

Australia

Sam Smith

Physical address

Same as postal address

Search address

23 Main Street

Marineville

NSW2000

Australia

Jason Brown

These addresses will show in Gojee as follows:

Label	Attention to	Contact number	Address	Source
-	Sam Smith	-	56 Jones St, Armidale, NSW, 2350, Australia	Xero
-	Jason Brown	-	23 Main Street, Marineville, NSW, 2000, Australia	Xero

- Note, only two addresses can be synced from Xero into Gojee, and these are not editable in Gojee.
- You can however add new Delivery addressed in Gojee using the green Add button at the top of the above image. Once added the entry will show with Gojee as the source:

Label	Attention to	Contact number	Address	Source
-	Sam Smith	-	56 Jones St, Armidale, NSW, 2350, Australia	Xero
-	Jason Brown	-	23 Main Street, Marineville, NSW, 2000, Australia	Xero
Main Office	Joseph Davidson	02 94405025	141 Kent Street, Sydney, NSW, 2000, Australia	Gojee

These delivery addresses can then be selected as defaults when creating purchase orders. Refer to the [Purchasing](#) section for details on creating purchase orders.

Purchase Order Description:

This section allows you to customise what will be shown on the purchase order pdf's you create from Gojee to send to your suppliers. The fields referred to are numbered in the images below from the [Inventory Edit Page](#):

Resources > Inventory > Artec YW Tri Colour Dimmable LED Downlights (15602)

Artec YW Tri Colour Dimmable LED Downlights (15602)

General

Suppliers

Attachments

Orders

Stock Adjustments

Stock on Hand Instances

Stock Movement

Reservations

Name

Artec YW Tri Colour Dimmable LED Downlights

Item Code

15602

Description

With Plug Base

Resources > Inventory > Artec YW Tri Colour Dimmable LED Downlights (15602)

Artec YW Tri Colour Dimmable LED Downlights (15602)

General

Suppliers

Attachments

Orders

Stock Adjustments

Stock on Hand Instances

Stock Movement

Reservations

Supplier	Supplier Price	Lead Time (days)	Item Order Priority	Supplier Order Priority	Last Ordered Date	Supplier Ref.	Supplier SKUs
Building Supplies Limited	\$3.0000	1	-	-	23 Sep 2020	Artec YW Tri Colour Dimmable LED Downlights	85L-T2
Local Hardware	\$3.0000	2	-	-	-	Artec YW Tri Colour Dimmable LED Downlights	LOW-T2

-
-
-

Goods Receipt:

This section provides and option to Automatically consume items onto the job when receiving goods.

- Generally, its recommended that this option is turned on in most cases. In this case, you would not need to go into the job and consume the stock manually, it will be done for you as part of the receiving process.
- If you choose to turn this option off, it means that when good are ordered for a job, the goods will be received into stock with a reservation for the job against them so other jobs cannot use the goods. When you're ready to consume the items on the job, you would need to go to the [Record Consumables](#) page and manually consume the goods from the reserved instances option.

Other Settings

This page allows you to upload your company logo, and set your job sequence number.

Edit organisation Demo Company (AU) 21 Sep 23

Go Account Mapping

Xero Branding Theme Mapping

Planning

Email Settings

Application Features

Job Task Activities

Payments

Resource Settings

Other Settings

These settings are not saved when Save Configuration is pressed, they are set immediately upon activating the related controls.

Configure letterhead

Top left logo:Left Logo.png

Change LogoDelete

Top right logo:Right Logo.png

Change LogoDelete

Sequences

These sequences represent references or numbers that Jigee will automatically generate and increment as default values for certain fields. Please be aware that setting these to values that are lower than the current sequence may cause duplicate references or numbers in the system.

Customer Job Number1

Set Sequence

Preview: 20001

Save Configuration

Cancel & Exit

Logo:

Gojee allows you to upload a logo to be displayed on the top left and top right. These logos are for use on documents created by Gojee, and not by the Xero branding themes. This applies to any documents that have the Gojee branding theme applied – as well as Delivery Dockets, as those don't have an equivalent to pull branding themes in for from Xero. An example of how these logos are displayed is provided below:



Delivery Docket				
Invoice To: City Limousines 13 Waverly Park Rd Melbourne, VIC, 3313		Delivery To: City Limousines 13 Waverly Park Rd Melbourne, VIC, 3313		Invoice Date: 2023-09-21 Invoice Number: J00001-My Job Ref# Reference: J00001-My Job Ref# Customer PO/Ref No:
				Demo Company (AU) 21 Sep 23 23 Main Street Marineville, NSW, 2000 Australia P: 02 99998888 E: test@me.com
Item Code	Description	Qty Ordered	Qty Shipped	Qty B.O
IS002	Arlec 9W Tri Colour Dimmable LED Downlights	4.00 each	0.00 each	4.00 each
IS004	Call Out Fee	1.00 each	0.00 each	1.00 each
IS001	Ceiling Fan	1.00 each	0.00 each	1.00 each

Job sequence number:

This setting allows you to change the Job ID number generated for the next jobs created in Gojee. This is useful to continue on with your current job numbering system. At present, the prefix is unable to be changed for newly generated jobs.

- Simply change the number in the field and click set sequence.
- An example of the next job number that will be created is provided for reference.

Next: [Back to Knowledge Base](#).