Installer

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An Installer record is created for each employee your company will be scheduling to perform labor on a Job. Installers may be setup as just an Installer type or both a Service Technician and Installer, if the individual could possibly be scheduled for Service Tickets.

When entering Labor Timesheets for a Job using Manual Timesheets, Bulk Timesheets or Auto-Generated Timesheets, the labor rates assigned to the Installer will be used to record the labor cost to the G/L. If your company will be using Payroll Timesheets, the Installer pay rates should be set to zero.

In the upper right area of the Installer setup is an Address field. This address should be input as where the Installer/Technician typically begins their business day. If the begin of the business day is from their residence, that address should be entered. If the work day begins from the office, that address should be entered. This address is used in SedonaSchedule on the Schedule Board to create a route map of the scheduled Tickets/Jobs for a day.

The Installer setup form is divided into three forms; Service, Installation and Routes. Each form will be described below.

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If an Installer could be scheduled for service calls or inspections, you should flag that person as "Both" an Installer and Service Tech. Even if an Installer would never perform service calls or inspections, it is a good idea to flag every Installer as "Both", for one particular reason.

On the Service setup form, is a field for a Text Message address and could also be used for an email address. If your company has subscribed to SedonaSync, having an email address linked to the Installer will provide many options for creating Sync Events that would benefit your Installers.

Service Form Data Entry Fields

- Service Company - Make a selection from the drop-down list.
- Warehouse - Make a selection from the drop-down list. Each Technician must be linked to a warehouse to support functionality in SedonaSchedule pertaining to parts used on Tickets. If a unique warehouse not exist for the Installer, you may link to either company's main warehouse, or a branch warehouse; whichever is applicable.
- Text Message Address - This field may be used to enter an address for sending text messages or you may use an email address if the Installers cell phone is email enabled.
- Expertise Level - This is a required field and you must select from a pre-defined list controlled by the software. The choices are 1-Beginner, 2-Low, 3-Medium, 4-High, and 5-Expert. Currently there is no designed functionality in the software tied to the Expertise Level; this is for informational purposes only.

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Installation Form Data Entry Fields
The Pay Rates entered on this form are used when posting timesheets to Jobs; the User entering the timesheet will select the pay rate to apply to the record.

If your company is not using Payroll Timesheets, typically, these rates are set to the burdened Labor Rates your company uses when quoting new Jobs. Using burdened labor rates on this form will make more sense when comparing estimate to actual.

- Install Company - Make a selection from the drop-down list.
- Regular Pay Rate - Enter the pay rate to use when work is performed during your company's regular business hours.
- Overtime Pay Rate - Enter the pay rate to use when work is performed outside of your company's regular business hours.
- Holiday Pay Rate - Enter the pay rate to use when work is performed on a Holiday.

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Routes Form Data Entry Fields

The Routes form is used to select in which Routes the Installer/Technician is available to work. Routes are used on Service and Inspection Tickets but not Jobs. A Route is typically defined as a geographical area. Your company may create as many routes as desired in the Routes setup table in SedonaSetup.
If your company is not using Routes, you may disregard this setup form.

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