SedonaSetup - Employee Setup: Payroll, Commissions

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Employees are used to link to other setup tables and to activate certain features of the software. It is recommended that you use alpha characters for the Employee Code field rather than using an employee number. The Employee Code is displayed in various areas of the software. Create one record for each employee who is classified as a Salesperson, Service Technician, Installer, anyone who will have access to the Inner Office Messaging function, and any person who will login to the SedonaOffice Application.
There are four possible setup forms for an employee record, General Information – required, Payroll* – optional, Commission Setup* - required if calculating commissions on Jobs, and Documents* - optional and only available if your company has subscribed to the SedonaDocs add-on module.

- The Payroll form is for companies using the add-on Payroll module. This information is used to create an output file from the Payroll Timesheets entered into the application.
- The Commission Setup data entry form is used for Employees to whom will be paid commissions on installation jobs. Commission Types must be setup prior to setting up commission information for the Employee.
- The Documents form is only visible to SedonaOffice customers subscribing to the add-on module SedonaDocs.

For more information on the add-on modules, please contact a SedonaOffice Sales representative (440) 247-5602.

The data entry fields on each tab are described below.

Employees - General Information

- User Code – If the Employee will be granted permission to login to the SedonaOffice application, you must select the User Code from the drop-down list that corresponds to this employee. For employees that will not login to the SedonaOffice application you may skip this field. You must setup your Users first.
- Type – Select the appropriate Employee Type for the Employee. If the employee is a salesperson, select SL. If the employee performs work for both the Service and Installation department, select either IN or SV. The employee types are controlled by the software, and you may not modify, add or delete any of these codes.
- Assigned To – From the drop-down list, select the Department in which the employee works. This is for informational purposes only. Departments which appear on the drop-down list are created in the Departments setup table.
- Supervisor & Credit Request Handoff – If your company has activated the use of the Credit Requests functionality, the Employee name selected from the drop-down field will be the next employee to which a Credit Request is assigned for approval. If your company is not using Credit Requests, you may select the Employee's supervisor from the drop-down list (used for information purposes only).

For Employee Types of SL (salesperson), this field is used to select another employee that will receive an override commission on jobs for this employee.

- Commission % – If the Employee is a salesperson type (SL), you may enter the default rate for commissions to be paid on installation jobs to the employee name selected in the previous field Supervisor.
- First Name, Last Name, Middle Initial – Enter information in each field for the Employee.
- Date of Hire – This is an optional field where you may enter the date the Employee was hired by your company.
- Termination (date) – This is an optional field where you may enter the date the Employee was terminated by your company.
- Job Approval Group – If your company has activated the Job Approvals function, and this employee will be authorized to approve Jobs, select the Group to with the Employee will be linked. You must first setup entries in the Job Approval Group setup table.

Employees - Payroll Information

If your company has purchased the add-on Payroll Export option, you will need to enter information for each employee on your payroll into the Employee Payroll form. If you are not using the Payroll Export function, you may still enter information into this for which will be for informational purposes only.

- Branch – From the drop-down list, select the primary branch to which the Employee is associated.
- Category – Select the appropriate primary Category for the Employee from the drop-down list.
- Payroll Account – Select the general ledger account number that will be used for posting the payroll expense for the Employee.
- Payroll File# – Enter the Employee's payroll file number used with your payroll company (typically this is the employee number).
- Salary or Hourly – Select the radio button which applies to the Employee.
- Pay Rates – If the Employee is paid on a Salary basis, enter the amount to be paid to the employee each payroll period. If the Employee is paid Hourly, enter the hourly rate for the Employee. If the Hourly Employee is paid overtime and you want SedonaOffice to automatically calculate overtime dollars, enter a rate in the Overtime Multiplier field. For example if the employee is paid time and a half for overtime hours worked, enter 1.5.

Employees - Commission Setup

If the Employee is a Salesperson that will be paid commissions on Jobs, you will set up the Employees commission types and commission rates in this form.

Each Employee may have an unlimited number of Commission Types assigned to his Employee record. You will first select a Commission Type from the drop-down list, and enter the default commission rate the Employee will be paid for the Commission Type. The default rate that will be used in a job may be overridden by the User setting up the job commission amounts.

If the Commission Type selected is based on the Estimated Gross Profit or Actual Gross Profit of a job, you will be able to set up a commission rate scale for that Commission Type for an Employee.

Employees - Commission Rate Scale

If the commission type for the employee is variable based on the estimated gross profit or the actual gross profit of the job you may set up the employee commission scale by clicking the Add Scale Values button to the right of the commission percentage field to set up the commission rate scale.

Employees - Commission Rate Scale Setup

When setting up the employee's commission scale rates may be manually typed into the grid or import the rate scale from different commission type rate setup from the same employee or use the rate setup from another employee's commission type setup.

There are two columns in the Commission Scale setup; Profit % and Use Rate. In the first row of the grid, in the Profit % column, type in the lowest Profit percent the Job must produce to be able to receive a commission. In the Use Rate column, type in the commission percentage (of the Job Margin) that will be paid to the salesperson. Continue on to the next rows to enter the various commission rates.
In the example below, the job margin achieved must be at least a 15% margin to be paid a 15% commission to the employee. The next rate is a 25% job margin to receive a 16% commission. If the Job margin is between 15% and 24.99%, the commission percentage will remain at 15%. If the Job margin reaches 25%, the 16% commission rate will be used, and so on.

Employees - Documents

If your company has subscribed to the add-on module, SedonaDocs, you have the ability to attach documents to the Employees record. Documents may be scanned-in or you may attach a previously saved electronic file.