SedonaSetup - SV - Service Companies

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Service Companies are used to identify which company is providing service or an inspection for an installed system on a Ticket.

If your company operates out of one office, you will only need to create one Service Company record; however, if your service department is divided between residential and commercial, you may setup separate Service Companies for each division. For companies operating under multiple branch offices, create a Service Company record for each branch office.
Service Providers (Subcontractors)

If your company uses subcontractors to perform service calls or inspections on behalf of your company, Service Company records will automatically be added to this setup table when a Vendor record is saved using the Vendor Type of Service Provider (a Service Company is linked to a Vendor record).

Do not manually add subcontractors to this table; they must be pushed into the Service Company setup table from the Vendor record.

The Service Company description will print on the Service Ticket.
The Service Company setup is divided into two setup forms; Company Detail and Labor Setup.

If you are using different general ledger accounts for each Service Company for the actual labor recorded on the Service Ticket, then you will be filling in the information on the Labor Setup form.

If all Service Companies will use the same labor general ledger accounts, do not setup information on the Labor Setup form; the general ledger accounts used will be those set up on the Service Setup Defaults form. The data entry fields for each of the two setup forms are described below.

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Service Companies - Company Detail Field Definitions
Create one record for each company that provides service to your customers; this would include sub-contractors which are referred to as Service Providers in SedonaOffice. If the Service Company is a Service Provider, you must first create a Vendor record in the Accounts Payable module and set the Vendor Type to Service Provider.

Company Detail Form

- Code – Enter the code for the Service Company. This may be an abbreviation or the full name (up to 25 characters) for the Service Company.

- Description - Enter the description for the Service Company. You may enter up to 50 characters in this field. The information entered into this field will print in the upper left area of Service Tickets.

- Ticket Form – Select the Standard form from the drop-down list.
- Vendor – Bypass this field if this Service Company is not a subcontractor. If the Service Company was created from a Vendor that has a Vendor Type of Service Provider, this field will automatically be populated with the corresponding Vendor Code.
- Warehouse – Select the main warehouse location for the Service Company.
- Category – Select the Category from the drop-down list that will be used when saving income and expense transactions for the service tickets assigned to this Service Company.
- COGS Acct – Select the G/L Account number from the drop-down list that will be used to record inventory part expense transactions to the general ledger for service tickets assigned to this Service Company.
- Expense Inventory on Service Tickets – If this option is selected, inventory parts will be expensed for each service ticket. If this option is not selected, inventory parts will be expensed at the Service Company level.
- When Invoiced – If the Expense Inventory on Service Tickets option was selected, by selecting this option, inventory parts will be expensed when the service ticket invoice is created. If this option is not selected, inventory parts will be expensed when the service ticket is closed.
- Critical Message – Optional. If a message is typed into this text box, the message will be displayed to the User whenever creating or accessing a Ticket assigned to this Service Company.
- Expires On – If a Critical Message is entered, you have to option of entering the date on which this message will no longer be displayed to your Users. If the Expires On date is left blank, the message will display until an expiration date is entered.

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Labor Setup Form

- Begin Day From Address – Enter the address for the Service Company.
- Appointments:
    - Start – Enter the first day of the working business week and the first appointment time of the day for the Service Company.
    - End – Enter the last day of the working business week and the last appointment time of the day for the Service Company.

Labor To GL:

- If your company will be recording the labor dollars expended on service tickets to the general ledger, two options for expensing labor are available:
    - Expense at Time of Entry - if this option is selected, when dispatch times are entered for the Technician Appointment, the labor dollars will be posted to the General Ledger.
    - Expense through WIP (Work in Process) - If this option is selected, the labor will post to the Service Work in Process account. When the Service Ticket is invoiced, the amount posted to the WIP account

will clear to the Labor expense account specified on this form.

- Labor Expense Account – Select the G/L account that will be used when posting the expense for the service labor; this is typically a Cost of Goods Sold (CGS) type of account.
- Labor Deferred – Select the G/L account that will be used when posting the deferred expense for the service labor. This is the offset account that is used when using WIP or Expensing at the time of entry; this is a Liability account type (OCL).
- Labor WIP – Select the G/L account that will be used when posting the service labor into WIP; this is an Asset account type (OCA).

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