SedonaSetup - SV - Technicians

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Technicians are your employees that will perform service on an installed system. A Technician is linked to a Service Company and Warehouse, and is assigned an expertise level.

Employee, Warehouse and Service Company records must first be created prior to creating a Technician record.

This setup form consists of three tabs of information:

- Service
- Installation
- Routes

Depending on the Employee's responsibilities one or all three forms will be filled in with information.

To create a new Technician, click on the New button, then select the Technicians Name from the drop-down list. The names displayed are from the Employee setup table. Enter the Technician address information. If the Technician typically begins their work day from home, enter their home address. If the Technician begins their day from the office, enter the company address. This address information is used in SedonaSchedule to map out a route of the scheduled appointments for a particular day.

- If the employee performs only service calls, select the Service Tech radio button under the Name field then fill in the information on the Service form.
- If you will be scheduling service calls using Service Routes, on the Routes form you will select which routes the technician is available for service calls.
- If the employee performs both service calls and installation jobs, you will select the Both radio button under the Name field and fill in the form information on the Service and Installation forms.

Create one record for each Technician.

Data entry fields and forms for each tab of the Technician setp is shown below.

Service Tab

- Technician Radio Buttons

  Below the Technician name field are three radio buttons

  - Service Tech
  - Installer
  - Both

  If the technician can only be scheduled for tickets, select the Service Tech option.

  If the technician can only be scheduled for job install appointments, select the Installer option.

If the technician may be scheduled for both tickets and jobs, select the Both option.

We highly recommend that all Technician's be set to the option of Both.

- Service Company - From the drop-down list, select the default Service Company to which the Technician will be assigned.
- Warehouse - Select the Warehouse assigned to the Technician. If a Technician is scheduled to a Ticket and Parts are used, inventory will be removed from this default warehouse.
- Text Message Address - You may enter a text message address or an email address in this field for the Technician. This enables you to send a text message or email to the Technician with Ticket information. This field is optional.
- Expertise Level - Select the expertise level which applies to the Technician. The choices listed are controlled by SedonaOffice. This is a required field.

Installation Tab

If the employee is available for both service and installation, fill in this form.
The Pay Rates entered are used when labor timesheets or service technicians are dispatched.
Typically, the labor rates entered are an average burdened hourly labor rate. These amounts are used for Job Costing only and not for payroll purposes.
Install Company - From the drop-down list, select the default Install Company to which the Technician will be assigned.
Regular Pay Rate - Enter the pay rate to use for Installation Labor performed during regular business hours.
Overtime Pay Rate - Enter the pay rate to use for Installation Labor performed outside of regular business hours.
Holiday Pay Rate - Enter the pay rate to use for Installation Labor performed on a Holiday.

Routes Form

This form is only required if you will be scheduling your Technicians utilizing Routes (activated on the Service Setup Defaults form).
A Route may be a geographical area or some other internal designation.
Routes are linked to customer System records and System Inspection records.
Check the box to the left of each Route for which the Technician is available.