# SedonaSetup - JM - Install Companies

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The Install Company is an important piece of the Job Costing functionality within the Job Management module of the application.

One Install company is selected on the Job Work Order form for each Job from the list of entries that are made in this setup table.  The fields populated for each Install Company will determine which General Ledger accounts will be used for posting material, labor, commissions and overhead expense transactions to the general ledger.

An Install Company may be your company or a branch office.  You may create as many Install Companies as needed.

You must first populate the Job Processing Setup form in SedonaSetup prior to making entries in this table.

Definitions of each field contained on this setup form are shown below.

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**Install Company Field Definitions**

- Install -  Enter the code for the Installation Company.
- Description - Enter the description - this will be the name of the Company that will print on Job Work Orders.
- Parts WIP - The G/L account which will used when parts are issued to a Job if the job type has been setup to use a material WIP account.
- Misc WIP - The WIP G/L account which will be used for non inventory related expenses.
- Warehouse - The default Warehouse linked to the Install Company.

**Labor to G/L**

- If your company will be posting Installer labor dollars to a job, check this box then select one of the two methods for expensing labor dollars.
    - Expense at Time of Entry - If this button is selected, labor will be expensed (to the Labor expense account selected below) as labor timesheets are posted to a job.
    - Expense through WIP account - If this button is selected, labor will be posted to a Labor Work-In-Process account when labor timesheets are posted to a job.
    - Labor Expense - Select the G/L expense account for labor.
    - Labor Deferred  If the Expense WIP account button was selected above, you will need to select the off-set G/L account for Labor Work In Process; this is a liability type account (OCL).
    - Labor WIP - If the Expense through WIP account button was selected above, you will need to select the G/L account for Labor Work In Process; this is an asset type account (OCA).

**Overhead**

If this box is checked if you will be expensing Overhead dollars associated with direct labor expenses. If using the WIP method for posting Labor, the same Labor WIP account will be used for posting Overhead amounts.

- Overhead Debit - Select the G/L account to debit.
- Overhead Credit - Select the G/L account to credit.
    - Overhead Type - % of Dollars - If this method is selected you will enter a percentage in the field Overhead Amount (below). When labor is posted using timesheet entry on the job, the system will calculate and post to the G/L, this percentage of each labor dollar expended.
    - Overhead Type – Flat (Amount per Unit) - If this method is selected you will enter a flat dollar rate in the field Overhead Amount (below). When labor is posted to a job using timesheet entry, the system will calculate and post to the G/L, this rate for each labor dollar expended.
- Overhead Amount - Depending on the Overhead Type selected above, enter a percentage or flat rate.

## Appointment Options

- If Jobs will be scheduled using SedonaSchedule, select a Dispatch Method Option:
- Dispatch
    - No – Selecting NO allows you to schedule Job Appointments within SedonaSchedule, but does not require you to enter dispatch times for the Installer Appointment. If selecting this option, you may manually enter timesheets to record labor against a job.
    - Yes – By selecting this option you will schedule Job Appointments within SedonaSchedule and be required to enter dispatch times for the Installer Appointment. If this option is selected, you have additional options for Timesheet entry (below).

### Timesheet

- If YES was selected for the Dispatch option above, you have two options of how a timesheet will be recorded against the job:
- Auto – If this option is selected, a timesheet will automatically be created and posted to the job once the Job Appointment has been fully dispatched. You also have the option of how much time to calculate on the timesheet. There are three date/time fields on the dispatch data entry form: Dispatch time, Arrival Time and Departure Time.
    - From Dispatch – if this option is selected, the timesheet created for the job will use the following calculation: (Departure Time – Dispatch Time)
    - From Arrival – if this option is selected, the timesheet created for the job will use the following calculation: (Departure Time – Arrival Time)
- Manual – If this option is selected, you will manually enter timesheets for your jobs.
- Weekends – If Job Appointments may be created for weekend days, select one or both options. This options selected are also use by the Job Planner tool in SedonaSchedule for labor resource planning.