

SedonaSetup - JM - Installers

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An Installer record is created for each employee you will be scheduling to perform labor on an installation job.

This employee may also have a secondary role of a Service Technician. If this is true, select the Both button adjacent to the Installer Name field.

If you already entered both your installers and service technicians in the Technicians setup table, it is not necessary to make entries into this setup table.

This setup form consists of three tabs of information:

- Service
- Installation
- Routes

If the employee performs only service calls, select the Service Tech 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 Installer is available for service calls.

If the employee performs both service calls and installation jobs, you will select the Both button under the Name field and fill in the form information on the Service and Installation forms.

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Installers - Service Form

If the Both (Service Tech & Installer) button was selected for the Installer, populate the fields on this form.

- 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.

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Installers - Installation Form

If the employee is available for installation, fill in this form. The Pay Rates are used when labor timesheets are posted to Job records. 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.

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Installers - 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.

Check the box to the left of each Route for which the Technician is available.

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