# Add an Employee

Last Modified on 11/02/2023 3:54 pm EDT

To open the Employees list, from the main menu, browse to Setup > Company > Employees.

Click the **Add Employee** button at the upper left of the form.
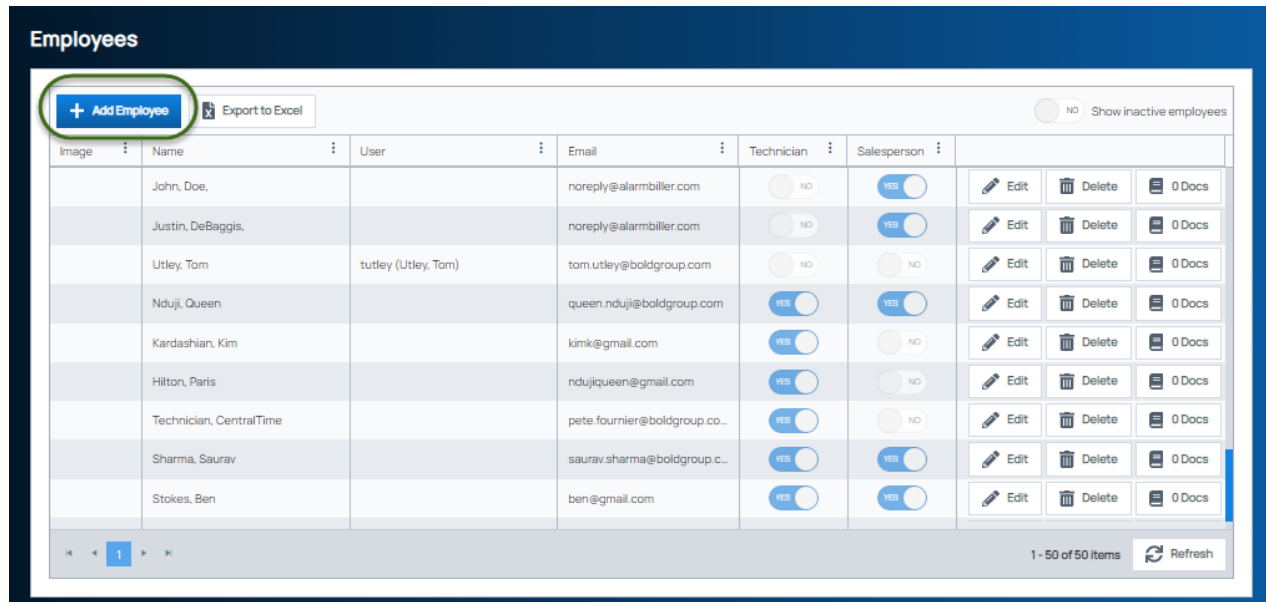


The Employee Edit form is displayed. This form is comprised of three tabs: Details, Misc, and Commissions. The information on the Misc tab is optional. Fill in the fields on the forms, and then click the Save button at the bottom when finished.

## Details tab

Data entry fields preceded with an asterisk are required.

- **Linked User** — If the employee is also set up as a user, select the user from the drop-down list.
- ***First Name** — Enter the first name of the employee.
- ***Last Name** — Enter the last name of the employee.
- **Address** — Enter the address of the employee.
- ***Email** — Enter the employee's email address.
- **Phone** — Enter the employee's phone number.
- **Cell Phone** — Enter the employee's cell phone number.
- **SMS Alerts** — If the employee is able to receive text messages on their cell phone, set the toggle button to Yes. If this option is set to Yes, you must enter a cell phone number.

## Misc tab

Data entry fields preceded by an asterisk are required.

- **Employee Number** — Enter an employee number. Many companies will use the employee's payroll number identifier in this field. A maximum of 25 characters is allowed.

- **Employee Since** — Enter the initial hire date of the employee.

- **Job Title** — Enter the employee's job title.

- **Description** — This is a text field to enter additional information about the employee.

- **Technician** — If this employee is a technician who can be assigned to or scheduled for work order appointments, set the toggle button to Yes.

- **Salesperson** — If this employee is a salesperson, set the toggle button to Yes.

  *Note:* An employee may be flagged as both a technician and a salesperson.

- **Sales Quota** — If the employee has a periodic sales quota, enter the amount. This is for reporting purposes only.

- **Inactive** — If the employee no longer works for your company, set the toggle button to Yes.

- **Inactive Date** — If the Inactive field was set to Yes, enter the date the employee became inactive.

- **Select Files** — You may attach an image file to the employee. The maximum file size is 5MB.

## Commissions tab

If this employee receives residential or commercial (or both) commissions, enter the percentage for these categories:

Labor Percentage

Material Percentage

Recurring Percentage

Non Recurring Percentage