

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.

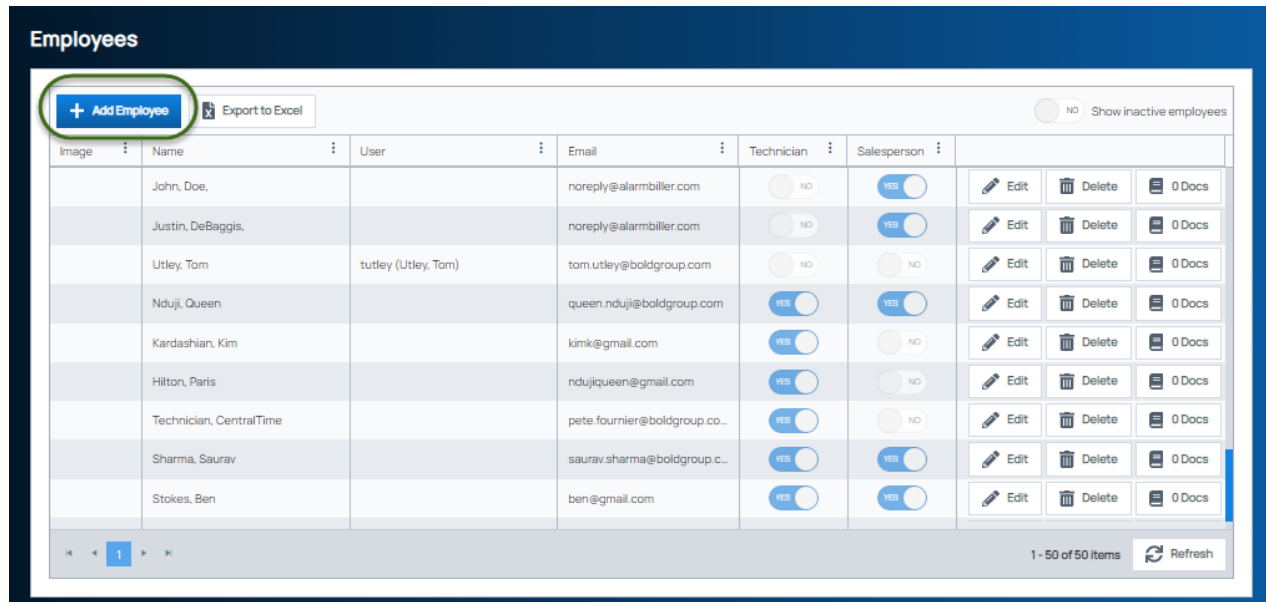


Image	Name	User	Email	Technician	Salesperson	
	John, Doe,		noreply@alarmbiller.com	<input type="radio"/> NO	<input checked="" type="radio"/> YES	Edit Delete 0 Docs
	Justin, DeBaggis,		noreply@alarmbiller.com	<input type="radio"/> NO	<input checked="" type="radio"/> YES	Edit Delete 0 Docs
	Utley, Tom	tutley (Utley, Tom)	tom.utley@boldgroup.com	<input type="radio"/> NO	<input type="radio"/> NO	Edit Delete 0 Docs
	Nduji, Queen		queen.nduji@boldgroup.com	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	Edit Delete 0 Docs
	Kardashian, Kim		kimk@gmail.com	<input checked="" type="radio"/> YES	<input type="radio"/> NO	Edit Delete 0 Docs
	Hilton, Paris		ndujiqueen@gmail.com	<input checked="" type="radio"/> YES	<input type="radio"/> NO	Edit Delete 0 Docs
	Technician, CentralTime		pete.fournier@boldgroup.co...	<input checked="" type="radio"/> YES	<input type="radio"/> NO	Edit Delete 0 Docs
	Sharma, Saurav		saurav.sharma@boldgroup.c...	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	Edit Delete 0 Docs
	Stokes, Ben		ben@gmail.com	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	Edit Delete 0 Docs

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.

The screenshot shows the 'Employee Edit' window with the 'Details' tab selected. The form contains the following fields:

- Linked User:** CarolynJohnson (Johnson, Carolyn)
- First Name:** Carolyn (with a 'Middle Initial' field)
- Last Name:** Johnson
- Address:** 44624 Oregon Trl (with an 'Address 2' field)
- City/State/Zip:** Plymouth, Michigan, 48170 (with a 'Plus 4' field)
- Email:** carolyn.johnson7757@gmail.com
- Phone:** 7342288977 (with an 'Ext.' field)
- Cell Phone:** Cell Phone
- SMS Alerts:** NO (toggle button)

At the bottom of the form are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'Employee Edit' window with the 'Misc' tab selected. The form contains the following fields and values:

Field	Value
Employee Number	1010
Employee Since	1/3/2000
Job Title	Manager
Description	Remote Employee
Technician	NO
Salesperson	NO
Sales Quota	0.00
Inactive	NO
Inactive Date	Inactive Date

At the bottom of the form, there is a file upload area with a 'Select files...' button and a 'Drop files here to select' instruction. Below the form are 'Save' and 'Cancel' buttons.

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
