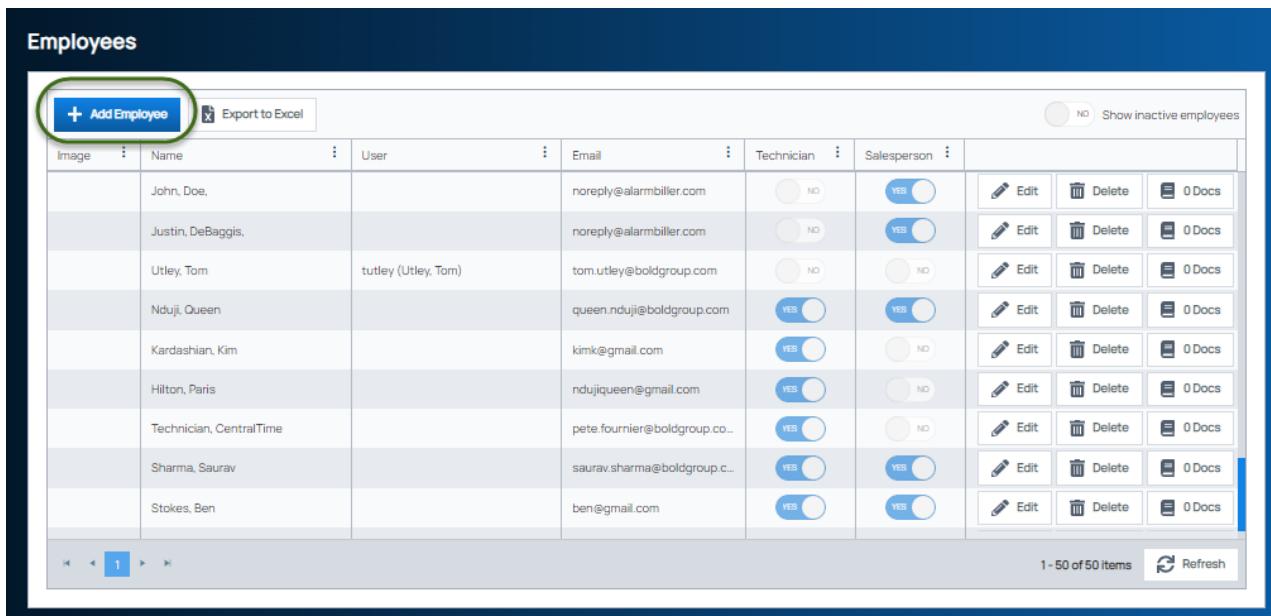


Add an Employee

Last Modified on 01/15/2026 10:58 am EST

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 screenshot shows a list of employees in a software application. The top navigation bar includes a 'Add Employee' button (circled in green), an 'Export to Excel' button, and a 'Show inactive employees' checkbox. The main table has columns for Image, Name, User, Email, Technician (with a toggle switch), Salesperson (with a toggle switch), and actions (Edit, Delete, 0 Docs). The data rows list various employees with their names, emails, and toggle switch status. At the bottom, there are navigation arrows, a page number (1), and a 'Refresh' button.

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

The Employee Edit form opens. 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.

Add Employee X

Details Misc Commissions

Linked User

First Name • Middle Initial

Last Name •

Address

City Zip Code -

Email •

Phone Ext.

Cell Phone

SMS Alerts NO

Types

Save Cancel

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.
- **Default Warehouse:** If the employee is a technician, this field is visible. You can select a default warehouse.
- **Technician:** If this employee is a technician who can be assigned to or scheduled for work order appointments, set the toggle button to YES. Selecting this switch shows the Default Warehouse field.
- **Salesperson:** If this employee is a salesperson, set the toggle button to YES.

Note: You can set an employee 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 can attach an image file to the employee. The maximum file size is 5MB.

Add Employee X

Commissions

| | |
|---|---|
| Employee Number | Employee Number |
| Employee Since | Employee Since <input type="button" value="Calendar"/> |
| Job Title | Job Title |
| Description | Description |
| Default Warehouse | <input type="button" value="Select"/> |
| Technician | <input checked="" type="checkbox"/> YES |
| Salesperson | <input checked="" type="checkbox"/> YES |
| Sales Quota | <input type="button" value="Select"/> Sales Quota <input type="button" value="Up"/> <input type="button" value="Down"/> |
| Burdened Labor Rate • | \$0.00 <input type="button" value="Up"/> <input type="button" value="Down"/> |
| Inactive | <input type="checkbox"/> NO |
| Inactive Date | <input type="button" value="Calendar"/> |
| <input type="button" value="Select files..."/> Drop files here to select | |

Save **Cancel**

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

Add Employee

X

Details

Misc

Commissions

Residential

Commercial

| | | | | |
|--------------------------|----|---|----|---|
| Labor Percentage | 0% | ▲ | 0% | ▲ |
| Material Percentage | 0% | ▲ | 0% | ▲ |
| Recurring Percentage | 0% | ▲ | 0% | ▲ |
| Non Recurring Percentage | 0% | ▲ | 0% | ▲ |

Save

Cancel