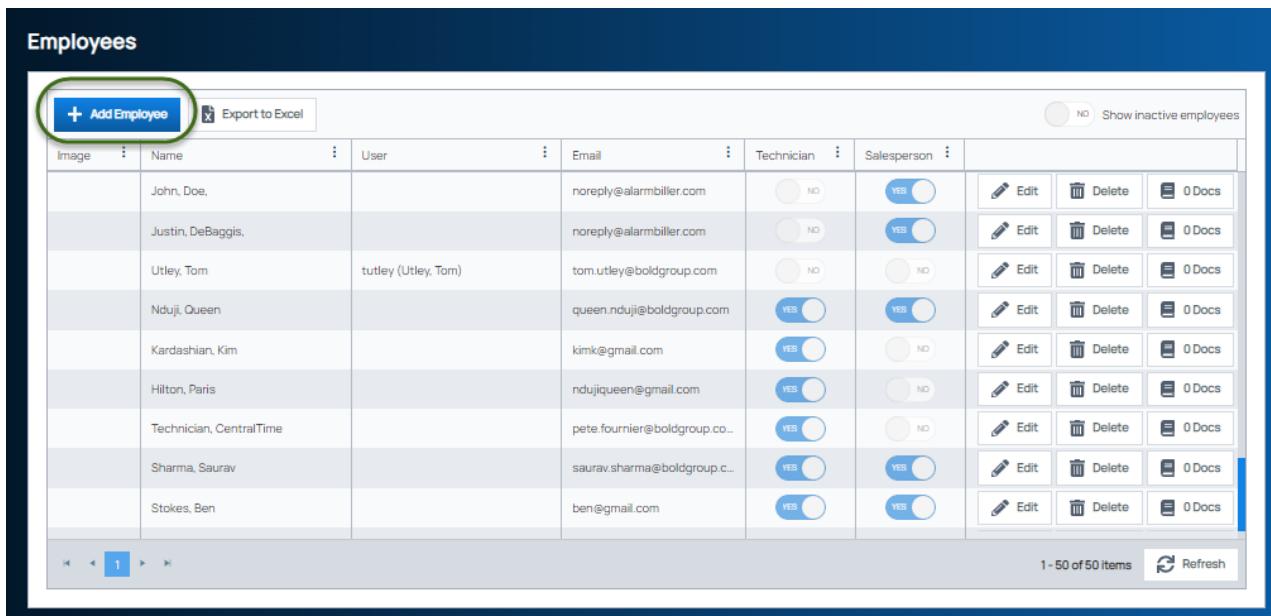# Add an Employee

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 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.

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.

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

Details | **Misc** | **Commissions**

	Residential	Commercial
Labor Percentage	0%	0%
Material Percentage	0%	0%
Recurring Percentage	0%	0%
Non Recurring Percentage	0%	0%

Save | Cancel