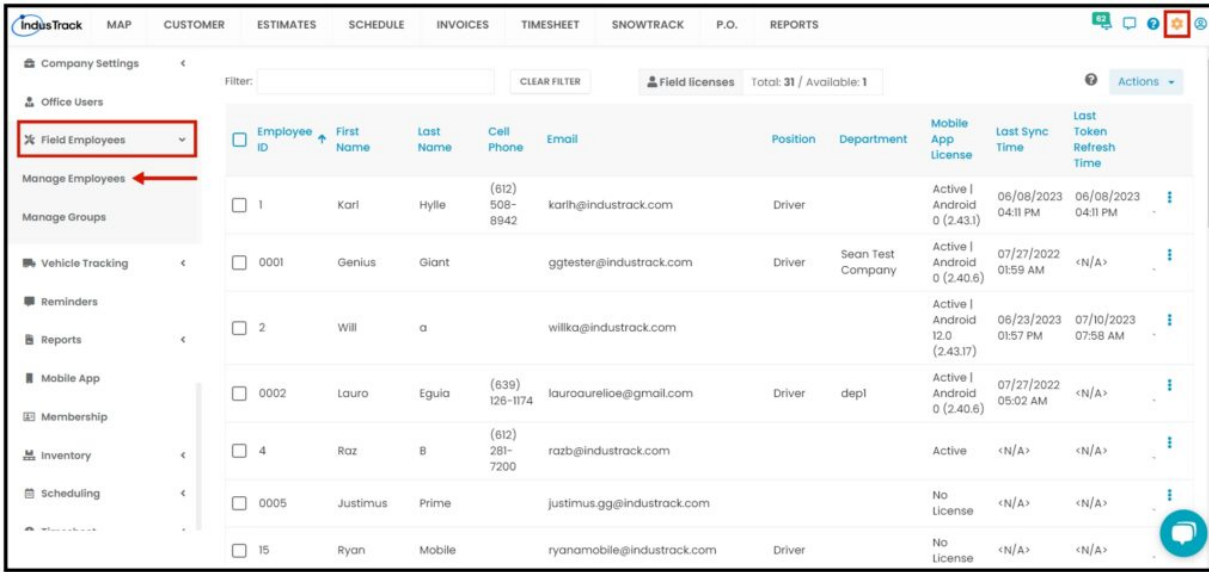


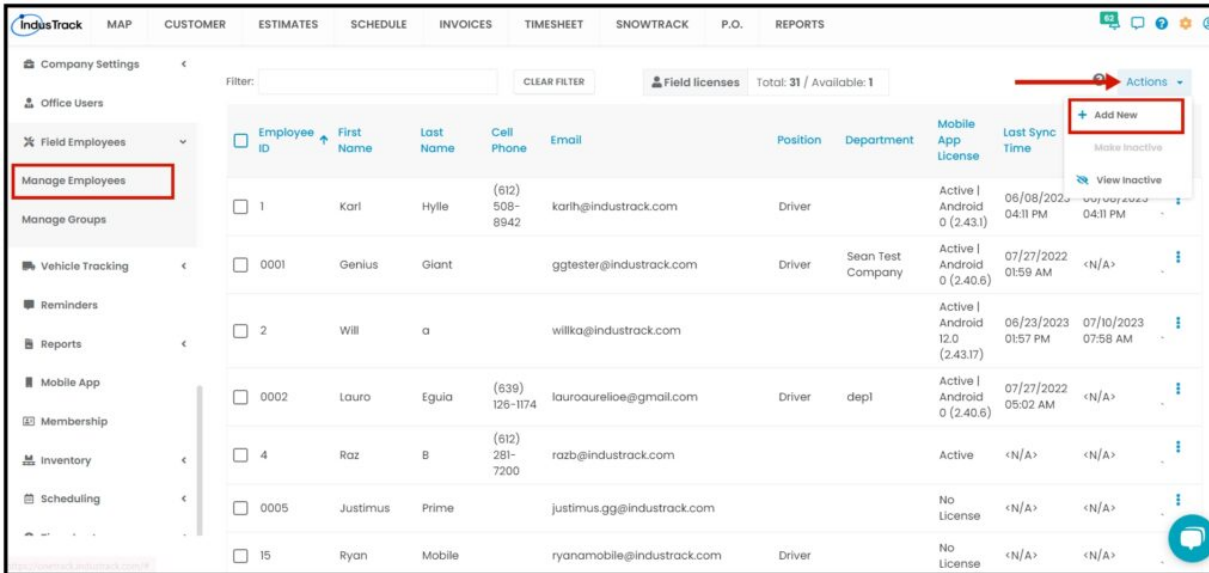
Set up Field Employees Profiles and Permissions

To manage Field Employee profiles and permissions go to **Settings > Field Employees > Manage Employees**.



Create a Field Employee

From the Manage Employees page, go to the **Actions** button and select **+ Add New** button.



The **Add/Edit Field Employee** page has 4 tabs:

- **Basic** – Create the profile, assign permissions and set up the field employee's mobile app license.
- **Advanced** – Add other work information in this tab including the role, rate per hour, license expiration and other. Upload a photo of the Field Employee from this tab as well.
- **Schedule** – Set up the Field Employee's weekly work schedule in this tab.
- **Payroll QB Sync** – When QB integration is set up, assign Payroll Items from QB to each employee to sync timesheet entries. This tab is greyed out if QB integration is not setup.

Basic Settings

Go to the **General** tab, and fill in the fields to create the field employee's profile. Fields with (*) are required.

- **General Information**

- Field Employee ID* – Key in a numeric ID number to be assigned to the field employee.
- First Name*
- Last Name*
- Assign Vehicle – If applicable, select the vehicle from the drop-down menu. The vehicles are set up under the Vehicle Tracking settings.

- **Contact Details**

- Mobile Phone – Information must be provided for the user to receive text alerts.
- Mobile Provider – Select the applicable one from the drop-down list. The information must be provided for the user to receive text alerts.
- Work Phone
 - **Mobile Phone and Mobile Provider** must be filled out for the field employee to receive text notifications

- **Mobile App Login Credentials**

- Fill in the details of the **Mobile App Login Credentials** section.
 - User ID (Email)* – Enter the field employee's email address. Does not need to be a valid email address, just an email address format, though a valid email address is required for emails via the messaging module or for **Send login credentials and app download link**.
 - Password* – Assign a password for the field employee.
- Tick the checkbox if any of the options below are applicable:
 - **Mobile App License** – To assign one of the available licenses to the Field Employee. You need to have an available **Mobile App License** to be able to assign one.
 - **Send login credentials and app download link** checkbox – Username, password, and a link to download the app will be sent to the email indicated above.
 - **Allow Supervisor Access** – Select this if the user will be assigned as a supervisor. This is required to assign this user as the supervisor of a Field Employee group or team.

- **Assign Module Permissions**
 - Enable the permissions for the mobile modules that the field employee will have access to.
 - Tick the checkbox for **All** to enable view access for all modules.
 - Untick all the checkboxes to provide **No Access** to all modules.
 - Select and tick the checkboxes of the modules to be given access to.
- **Assign Customer Permissions**
 - Enable the permissions for the customers that the field employee will have access to.

Advanced Settings

Go to the **Advanced tab** and fill in the fields to add more information on the field employee’s profile.

- Assign Position
 - If the position has been entered before, select it from the dropdown list.
 - If the position has not been entered before, enter this on the field.
- Assign Department
- Cost per Hour – This value will be used for calculating pay.
- Bill Rate per Hour – this is what you charge customers for this field employees time
- Driver skill Level
- Driving License Renewal – This refers to the expiration date of the field employee’s driver’s license. An automated Reminder is sent out if this information is provided and the Reminder is properly set up.
 - To add a date, use the **date picker**.
 - To delete a date, use the **X** button next to it.
 - To update/edit the date, select another date from the date picker.
- Medical Card Renewal – Similar to the driving license renewal reminder, one is also sent out for Medical Card renewals.

Edit Field Employee

Basic **Advanced** Schedule

Assign Position HVAC Installer

Assign Department Assign Department

Cost Per Hour 33

Bill Rate Per Hour

Driver Skill Level Professional

Driving License Renewal 8/31/2022

Medical Card Renewal 12/31/2022

Profile Image

About

Edit Field Employee

Basic **Advanced** Schedule

Assign Position

Assign Department

Cost Per Hour

Bill Rate Per Hour

Driver Skill Level

Driving License Renewal 8/31/2022

Medical Card Renewal 12/31/2022

Profile Image

About

AUG 2022

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Upload the field employee's image or photo. You can upload a photo of the field employee or his ID or Driver's license.

- To add a photo, click on the image and select **Upload Image**. Choose the image and upload it.
- To edit/change the photo, click on the image and select a different image.
- To delete a photo, click on the image and select **Delete Image**.

Edit Field Employee

Basic **Advanced** Schedule

Assign Position HVAC Installer

Assign Department Assign Department

Cost Per Hour 33

Bill Rate Per Hour

Driver Skill Level Professional

Driving License Renewal 8/31/2022

Medical Card Renewal 12/31/2022

Profile Image

Upload Image

Delete Image

Write something about the field employee on the **About** field. This, along with the photo, is a field which can be included in automated customer notifications so the customer knows a little about the tech who is coming to provide service.

Schedule Settings

Set up the field employee's weekly work schedule for capacity planning.

- **Day of the Week** – Select the days that the field employee will be on duty.
- **Work Starts and Work Ends** – For each of the days selected, set the work start and end times. Directly edit the default time or use the time picker.
 - The time pickers are enabled only when the day is selected. You will not be able to set or edit the times if the day of the week is unticked.

Edit Field Employee

Basic Advanced **Schedule**

Day of Week	Work Starts	Work Ends	Lunch Break	Lunch Starts	Lunch Ends
<input type="checkbox"/> Sunday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Monday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Tuesday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Wednesday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Thursday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input type="checkbox"/> Friday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input type="checkbox"/> Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input type="checkbox"/> Vacation	Start Date: 6/11/2022			End Date: 6/18/2022	

Time picker for Work Ends: 6:00 PM

- **Lunch Break** – Select the days that the field employee is entitled to a break time. The checkboxes are enabled only when the day is selected.
- **Lunch Starts and Lunch Ends** – For each of the Lunch Breaks selected, set the lunch start and end times. Directly edit the default time or use the time picker.

Edit Field Employee

Basic Advanced **Schedule**

Day of Week	Work Starts	Work Ends	Lunch Break	Lunch Starts	Lunch Ends
<input type="checkbox"/> Sunday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Monday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Tuesday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Wednesday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Thursday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input type="checkbox"/> Friday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input type="checkbox"/> Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input type="checkbox"/> Vacation	Start Date: 6/11/2022				

Time picker for Lunch Starts: 1:00 PM

- **Vacation** – Select this option if the field employee has a scheduled vacation time. This will automatically remove the field employee from the schedule.
- **Vacation Start and End Dates** – Set the inclusive dates of the vacation. Use the date picker.
- To set a future date, select the End Date first. The start date can not be set if this is after the indicated end date.

Edit Field Employee

Basic Advanced **Schedule**

Day of Week	Work Starts	Work Ends	Lunch Break	Lunch Starts	Lunch Ends
<input type="checkbox"/> Sunday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Monday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Tuesday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Wednesday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Thursday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Friday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>	1:00 PM	2:00 PM
<input type="checkbox"/> Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>	1:00 PM	2:00 PM
<input checked="" type="checkbox"/> Vacation	Start Date: 7/4/2022			End Date: 7/9/2022	

Save the New Field Employee Profile

Use the **Save button** at the bottom of the **Add Field Employee window** to create the new User. The user will be added to the Field Employees list.

Day of Week

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Vacation

Work Starts

9:00 AM

9:00 AM

9:00 AM

9:00 AM

9:00 AM

9:00 AM

9:00 AM

Start Date

8/15/2022

Work Ends

6:00 PM

6:00 PM

6:00 PM

6:00 PM

6:00 PM

6:00 PM

6:00 PM

Lunch Break

Lunch Starts

1:00 PM

1:00 PM

1:00 PM

1:00 PM

1:00 PM

1:00 PM

1:00 PM

Lunch Ends

2:00 PM

2:00 PM

2:00 PM

2:00 PM

2:00 PM

2:00 PM

2:00 PM

End Date

8/18/2022

CLOSE

SAVE



