

Employees

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Any salesperson using Sales Automation needs to have both an employee profile and user profile. Navigate to the employees setup menu to start adding employees. Below you will find descriptions of some of the fields in the employee setup menu.

- *Linked User*: Link the employee profile to the respective user profile by selecting the name from the Linked User field. The drop-down will only shows added users. If you have not created a user profile for the employee, go back and add them as a user before linking the employee profile.
- *Technician*: Selecting the “Technician” checkbox ensures that this employee will be added to the technician selection field when creating a work order later in the workflow.
- *Salesperson*: Selecting the “Salesperson” checkbox ensures that this employee will be added to the salesperson selection field when creating a proposal later in the workflow.

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