Create & Assign Employees

Add employees and assign the correct locations and roles.

- How to Create an Employee in Back Office
- How to Assign Locations and Roles
- How to Set a Secure Employee PIN
- How to Mark an Employee as a Technician or Driver

How to Create an Employee in Back Office

1. Open **Employees**.
2. Select **Add Employee**.
3. Enter the employee’s first name, last name, phone, and email as applicable.
4. Create the employee’s register PIN.
5. Choose optional employee flags such as driver or technician when they apply.
6. Add internal notes or address information if needed.
7. Assign at least one location and role.
8. Review the record and select **Create Employee**.

How to Assign Locations and Roles

1. While creating or editing the employee, open **Locations & Roles**.
2. Select a location where the employee is allowed to work.
3. Select the role the employee should have at that location.
4. Add the assignment.
5. Repeat for any additional authorized locations.
6. Review the assignment list and save.

The same employee may have different roles at different locations when business responsibilities require it.

How to Set a Secure Employee PIN

The employee PIN is used for register access and authorization workflows.

- Use a PIN that is not easily guessed.
- Do not reuse a manager or owner PIN for another employee.
- Do not share PINs between employees.
- Change a PIN when it may have been exposed.
- Verify the employee can sign in only to assigned locations.

A PIN identifies the employee performing activity, so individual credentials are important for accountability.

How to Mark an Employee as a Technician or Driver

1. Create or edit the employee.
2. Find the employee classification options.
3. Enable **Technician** when the employee should appear in supported repair-assignment workflows.
4. Enable **Driver** when the employee performs supported delivery or driver work.
5. Save the record.

These classifications support workflow selection; the employee’s location role still controls authorized access.