Employee Roles

Create and maintain roles that control what employees can do.

- What Is an Employee Role?
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- How to Design Roles Safely

What Is an Employee Role?

An employee role is a reusable set of access rules that determines what an employee can do at an assigned location. Examples may include Owner, Manager, Sales Associate, Technician, or another role designed for your workflow.

Assign the least access needed for the employee’s responsibilities. Roles are separate from job titles: a role controls software access.

How to Open and Manage Employee Roles

1. Open **Employees** in Back Office.
2. Select **Manage Roles**.
3. Review the existing role list.
4. Create a role when a new reusable access pattern is needed.
5. Edit a role when its authorized responsibilities change.
6. Save and verify the resulting permissions before broad assignment.

How to Design Roles Safely

- Separate owner or administrator access from daily employee access.
- Give managers only the elevated controls they actually use.
- Limit financial deletion, refunds, settings, employee management, and sensitive reports.
- Create a technician role for repair work without unrelated financial access when appropriate.
- Review roles whenever responsibilities change.
- Test a role with a non-production workflow before assigning it widely.