Maintain Employee Access

Search, edit, reassign, and safely remove employee access.

- How to Edit an Employee
- How to Change an Employee Role or Location
- How to Remove Employee Access Safely
- Back Office Employee Troubleshooting

How to Edit an Employee

1. Open the employee directory.
2. Search for the employee.
3. Select the edit pencil.
4. Update identity, contact, PIN, classifications, notes, address, or location-role assignments.
5. Review every active location.
6. Save the changes.

When an employee changes jobs or locations, update access promptly rather than creating a duplicate employee.

How to Change an Employee Role or Location

1. Edit the employee in Back Office.
2. Review **Locations & Roles**.
3. Remove an assignment the employee no longer needs.
4. Add the correct location and role.
5. Save.
6. Have the employee sign in again and verify the available workflow.

Do not leave old elevated roles active after a transfer or promotion change.

How to Remove Employee Access Safely

Removing an employee can affect access but should not erase legitimate historical accountability.

1. Confirm the exact employee and reason for removal.
2. Review every assigned location and role.
3. Remove or disable access according to company policy.
4. Use deletion only when appropriate and authorized.
5. Verify the employee can no longer sign in.
6. Confirm historical sales, repairs, shifts, and audit records remain understandable.

Back Office Employee Troubleshooting

An employee cannot sign in

Confirm the employee has an active assignment for that location and the correct PIN.

A role is missing

Open Manage Roles and verify the role exists before assigning it.

The employee sees the wrong tools

Review the role assigned at the current location; the same employee may have different roles elsewhere.

An employee appears twice

Search the full directory before creating a new record. Update the existing employee when appropriate.