How to add a new Staff member into Eclipse

Introduction

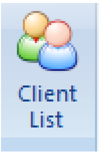
This page is dedicated to showing you how to add a new staff member into Eclipse Stock & Accounting.

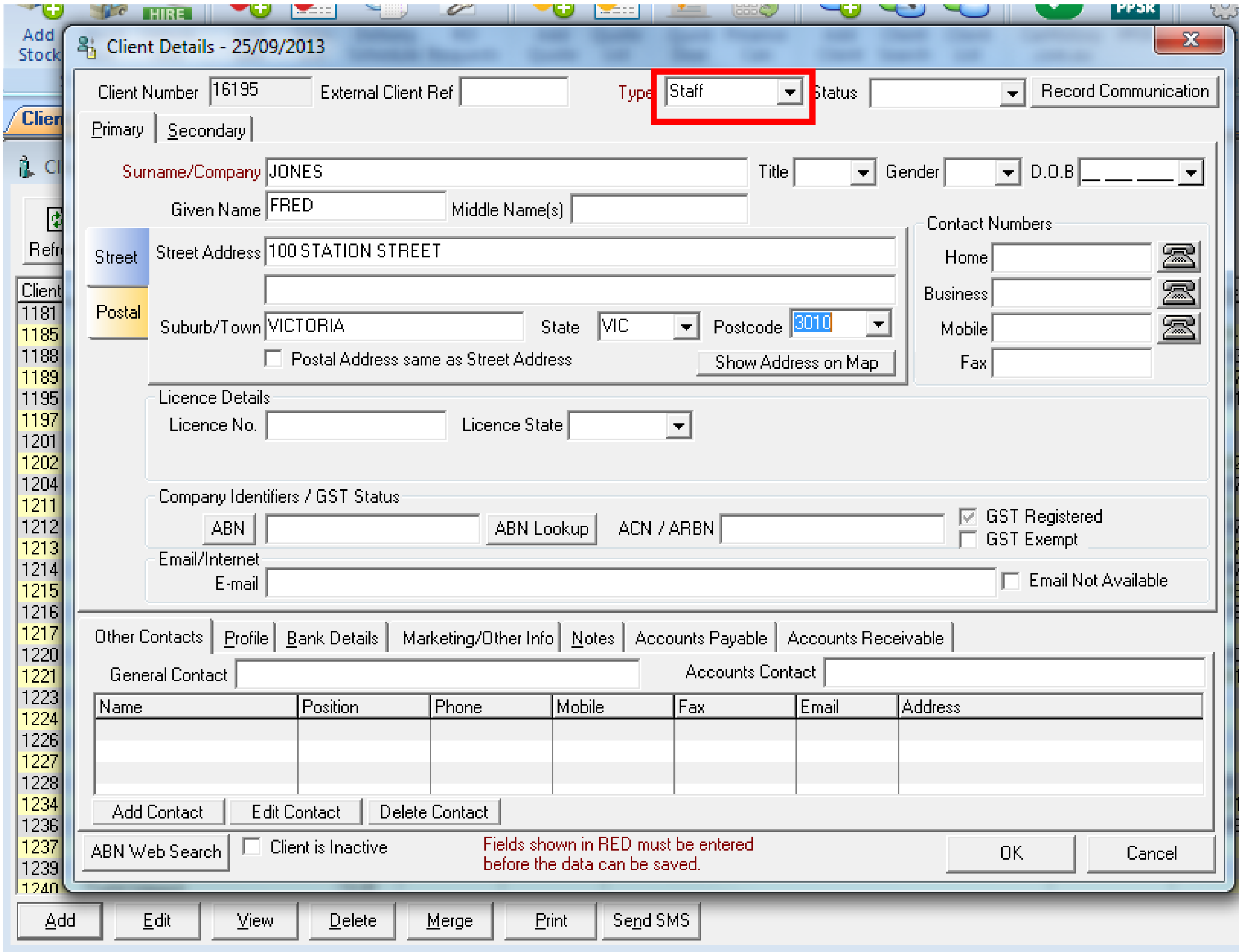
On this page:

Related pages:

How to add a new Staff member into Eclipse

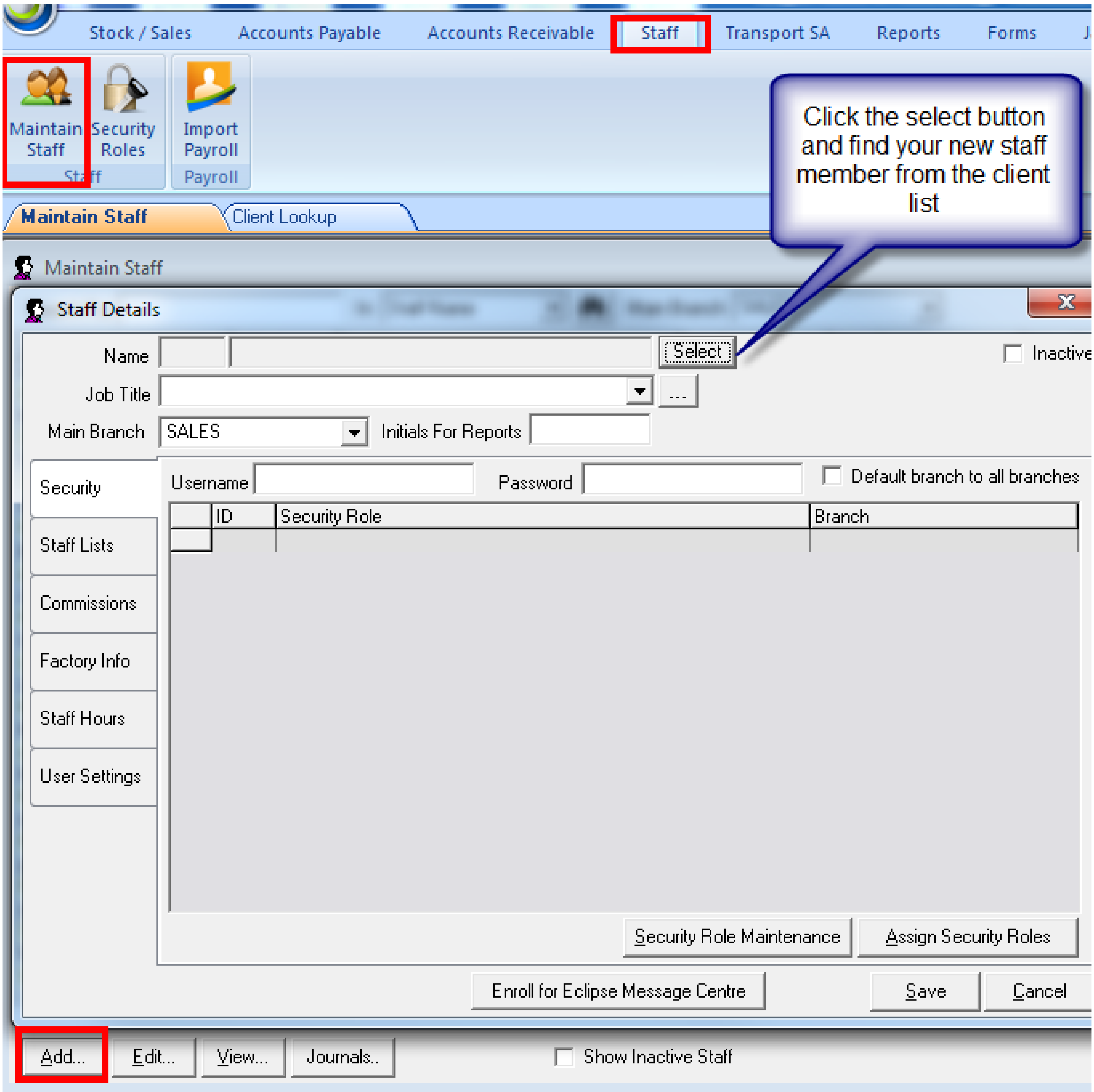
The first thing you need to do is add them into your client list as a staff member





Once you have added your new staff member to your client list you can set them up with the relevant role and security.

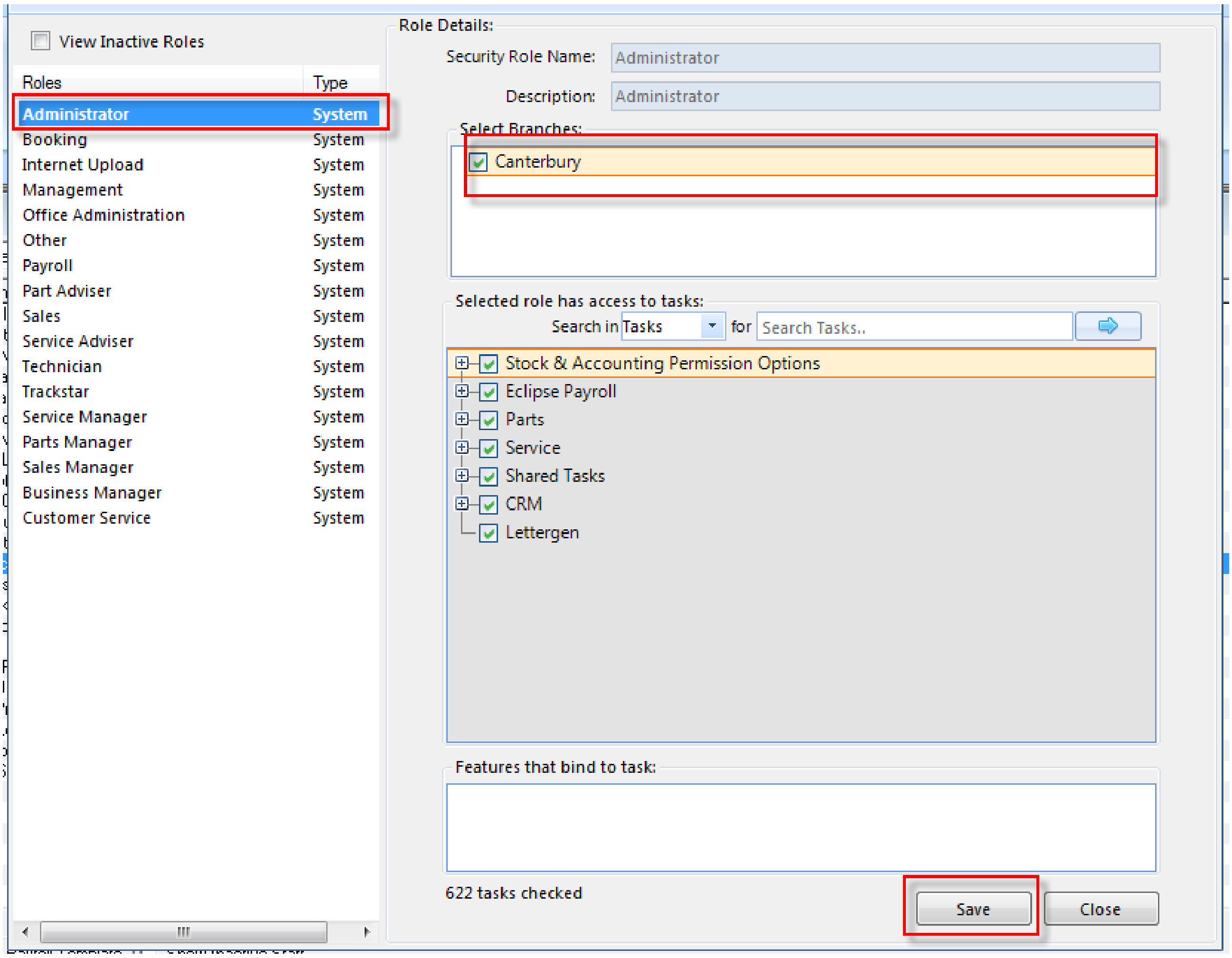
To do this go to your staff menu and maintain staff button.



Once you have added your new staff member from the staff list you will need to give them a Job title and assign them to the main branch they will be working from.

This staff member will also need a user name and password so they can access the system (if you have security turned on make sure this password is kept secret so no one else can access the system) we recommend all staff are given their initials as their user name.

To set up security permissions click the Assign Security Roles Button. This will allow you to add an existing security role to this new staff member, if you wish to give them a customised role you will need to create this.



On the left hand side of the screen you will be able to see all of the standard roles ultimate supply and below these you will be able to see any custom roles your dealership has created.

Highlight the role you wish the new staff member to have then click to tick the branch they need these permissions in followed by the save button.

You will also need to add this new staff member to the staff lists if you want their name to be available to choose in their given role. For example if your adding a salesman you will need to use his name on sales and acquiring cars.