

# shared staff

Use this as a guide to shared staff management.

## Shared Staff Overview

A master store will be created to use for the staff model. All staff should be standardized to master store settings prior to merge.

- Staff are merged into a single staff list
- Staff not in the master store but present in other stores will be kept
- Duplicate staff not in master store but present in other stores will be merged together if identical on merge criteria (first and last name)
- All existing data will be updated with new staff identification.

Staff items that are not shared:

- Resources
- Staff service pricing
- Schedule templates
  - You will need to remember to assign services and schedule templates per location.

## Shared Staff Basics

- The same staff members are listed at all locations
- New staff are added simultaneously at all locations
  - A single staff record is created, but recognized at all locations
- Basic staff information such as password, address, phone number and category is shared and updated between locations

## Location Information

- All location specific information should be assigned per location, specifically – schedule templates, commission rates, schedule printing days and service pricing.
- A single staff member will not be available to perform a service until they have been assigned a schedule template at that location, and have been assigned that service in their list at that location.
- Verify passwords, if a staff member has a different password in each location, only the password in the master store record is valid.
  - A new field for the staff's Primary Location will also be available. This field can be used to display primary location on staff reports, and web booking availability.
  - You will notice the drop down list to select the security group is moved to the location information tab in the middle of the staff file.

The screenshot shows the 'Staff' interface for 'Ashley Fox'. The 'Information' tab is active. Fields include: First Name (Ashley), Last Name (Fox), Book Name (Ashley), Staff Code (AF), Gender (dropdown), Address (123 Main St), City (New Orleans), State (LA), Zip Code (70130), Home Phone (555-555-5555), Work Phone, Mobile (222-222-2222), Password (\*\*\*\*), Verify, Social Security, Paper Type (Alpha), Employee ID (3878), and Primary Location (Corporate Office). A red warning box states: 'Please format mm/dd/yy. Example: 01/01/62'.

The screenshot shows the 'Staff' interface for 'Ashley Fox' with the 'Location Information' tab active. The 'Location Name' is 'Corporate Office'. Under 'Information for Corporate Office', there is a 'Print Weekly Schedule' section with checkboxes for days of the week: Sunday, Thursday, Monday, Friday, Tuesday, Saturday, and Wednesday. A 'Security Category' dropdown is set to 'Dayholder' with an 'Edit' button.

