3. How to Create an Employee

Whether you need to update a user's details, reassign them to different Projects, or completely revoke their access, the Employees module gives you a single place to do it. Follow the steps below, using the numbered calls out to guide you through each action.

Why You Might Edit an Employee

1. **Change Contact or Name** when someone legally updates their name or email.
2. **Adjust Role or Permissions** if they're promoted or change teams.
3. **Reassign Projects & Desks** as responsibilities shift.
4. **Enable / Disable 2FA** for security policy updates.

Before You Begin

1. You can create two employee types: **Employee** for internal team members who need module access based on their responsibilities, and **Affiliate** for external or partner users who work only with assigned affiliate hubs and leads.
2. You cannot edit your own Role to a higher privilege than you currently hold.
3. To add a user to a Desk, they must already be assigned to that Project.

Step-by-Step Instructions

1. Open the Employees List
In the left-hand navigation panel, click **Employees.** You'll see a table of all user accounts in your system, with columns for Name, Email, Active, Role, Projects, Desks, Created Date, Updated Date, Last Login, and Actions.

2. Launch the Add Employee Form
In the top-right corner of the **Employees** table, click **+Add**. A blank Add employee form appears.

3. Fill Out the General Information
On the left side of the form, complete the core fields:

Type: Choose the required employee **Type** from the dropdown. For internal users, you can select Manager, Sales, Analytics, Support, or Presale. To create an affiliate, choose Affiliate type.

Name: Enter the full name as you want it to appear (e.g. "Jane Doe").

Role: Select the system role (Admin, Viewer, etc.) from the dropdown. This determines which modules and actions the user can access.

> **Please note: The available roles depend on the selected employee type. If you select Affiliate, the Role field will show only roles with the Affiliate role type. If you select any other employee type, the Role field will show only roles with the Employee role type.**

Email: Enter the user’s email address, which becomes their login and is used for system notifications.

Password: Type a secure password (minimum 8 characters, with uppercase, lowercase, number, and special character). **Where**: Under Email, as a text box with two icons on the right.

1. Click the □ “Generate” icon to auto-create a strong password.
2. Use the □□ “Show/Hide” icon to verify your entry.

4. (Optional) Custom Additional
Below General, use the **Additional** tree picker to assign any custom tags—such as Region, Business Unit, or Department. These tags power advanced filters and permission scopes elsewhere.

5. Assign Projects

On the right side of the form:

Projects Panel: Shows which Projects this employee can access. Click + Add project to open a dropdown of all available Projects. Select one or more to grant access.

When an employee is created inside a specific Project, that Project is assigned to the employee by default. After creation, the employee appears in the employee table for that Project.

Once a Project is assigned, you can later add the employee to specific Desks within that Project via the Desks module.

6. Configure Two-Factor Authentication (2FA)
Below the Projects panel, the **Two-Factor Authentication** section displays whether WebAuthn or TFA is enabled for this user. No action is needed here during creation—2FA setup occurs on first login.

7. Save Your New Employee
When all required fields are complete (and any optional settings chosen), click **Save** in the bottom-left corner of the form. You’ll return to the main Employees list, where the new user now appears with their details, assigned Projects, and metadata.

By following these steps—each tied to the corresponding form element—you'll ensure every new employee is correctly configured with the proper access, roles, and security settings in WBCS.

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