Add a new salesperson/operator

The tasks listed below must be done by the computer security officer to set up a new salesperson/operator.

1. Have your hardware/software provider set up the new UNIX login/password. Be sure they tell you the terminal #'s assigned to the new person.

2. Enter the new operator using OPM #1. If you are not sure what their security settings should be, look at the setup for another person that performs the same tasks and set them up the same.

3. If they should belong to any operator groups, then set this up under OPM #2. Employee groups are used to send messages to groups of employees, and to assign certain capabilities within the software. It may help you to determine this if you look at the groups that have been assigned to another employee with the same job function. See letter 'O' in the Tables File on the System Maintenance for the list of Groups of Operators currently set up in your system.

4. If they are a salesperson, then enter their salesperson #/initials in SAM #1. If they receive commission, set this up under Commission Rate Maintenance on the SAM menu.

Note: There is a shortcut for the next 4 steps: if you know that the new terminals should be set up the same as the settings for an existing terminal, then use option #11 on the DEF menu to COPY the settings from one terminal to a new terminal and then you can edit the options if there are a few differences.

5. For each of the terminal #'s that have been assigned to the new person, you will need to setup the Terminal using option #9 on the DEF menu. This allows you to set such controls as the menus for this operator and the list of printers that are displayed.

6. If they are going to enter orders, also set up the information under DEF #8. This must be done before they can enter an order in Sales Order Entry.

The next 2 steps are optional:

7. If you wish to limit the information (usually cost) that they can see in Customer Price Check, you can do this using option #6 on the DEF menu.

8. If you wish to limit the information (usually cost) that the operator can see in Stock Item Inquiry, you can do this using option #7 on the DEF menu.

Note: If you want the system to default the new salesperson as the 'Inside Salesperson' on each new order entered, then fill in their salesperson code in field #21 (DEFAULT SALESMAN #) in Sales Order Entry Prompt Control on the DEF menu.

For more information on the settings in the menu options referenced above, see Chapter 2: DEFAULTS of the documention.