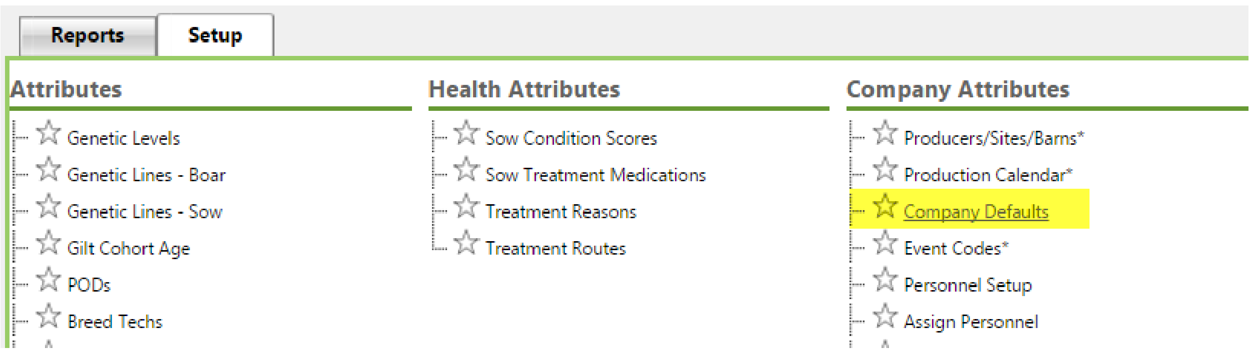
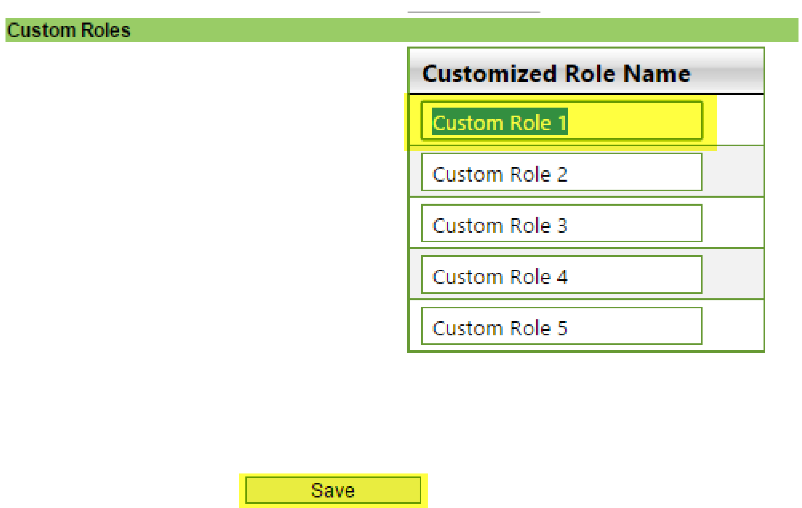
Personnel Setup

The Personnel Setup screen is where you will add your staff and assign them to their Role within the company. You can also track any Certification an individual has. There are six built in Roles already created. These six are: Supervisor, Service Tech, Veterinarian, Nutritionist, Barn Manager, and Site Manager.

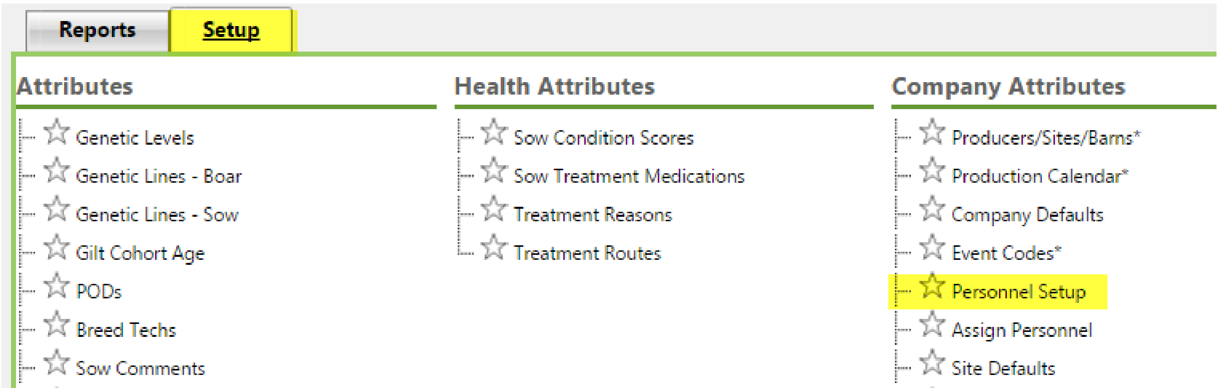
In addition to these six Roles each company is allowed 5 Custom Roles to name as you need. To name these Roles go to the Setup tab, Company Attributes section of a module. Click on Company Defaults.

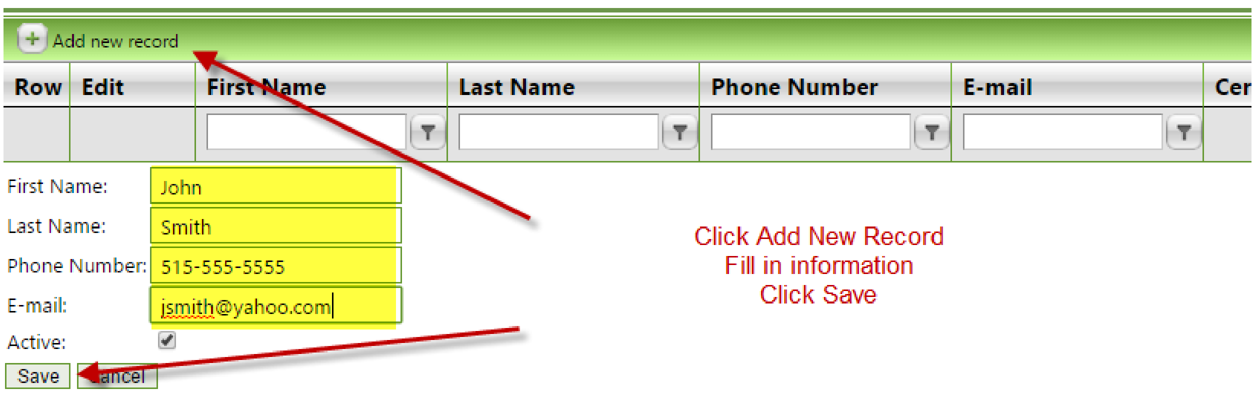


Scroll to the bottom to Customized Role Name. Rename any field to the Role you want. Click Save.

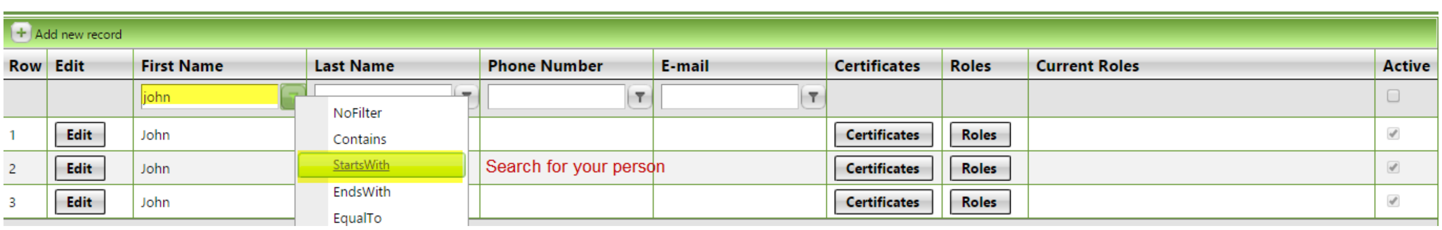


To set up your Personnel

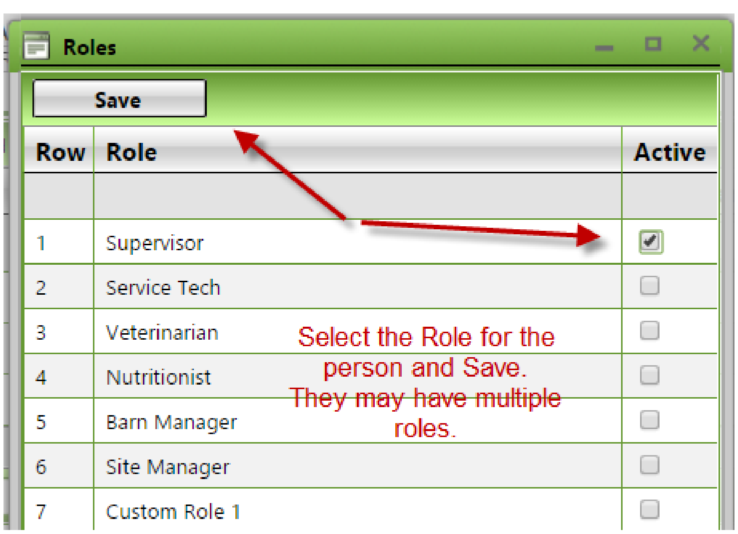




To Assign Roles

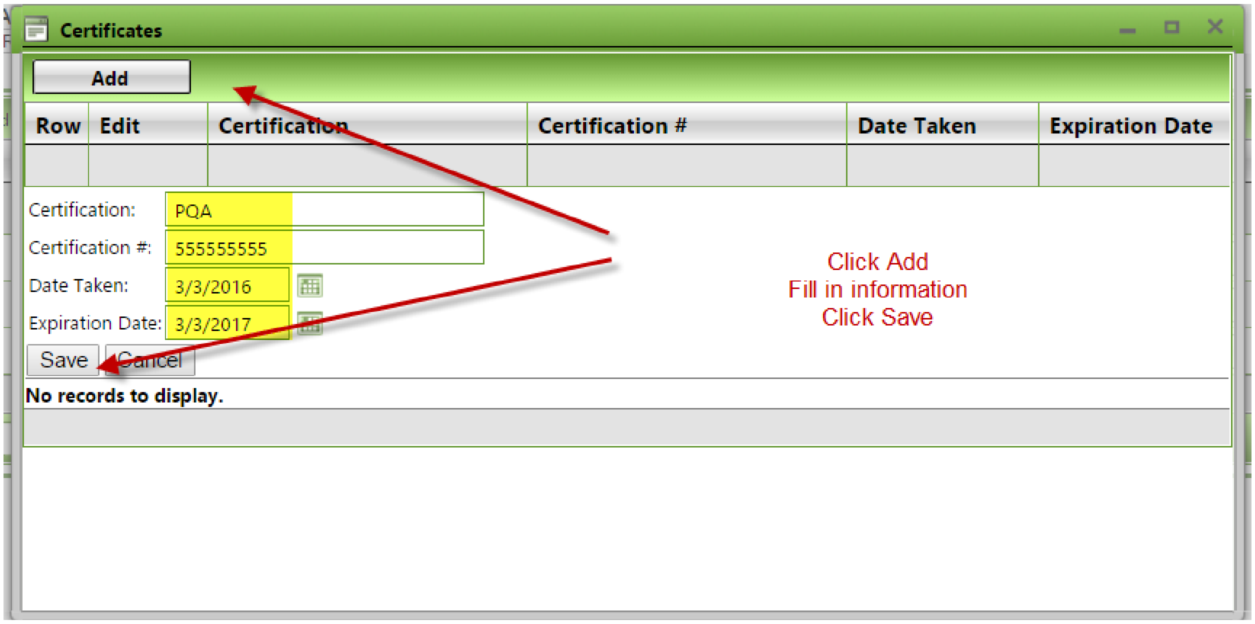


Click on Roles Button

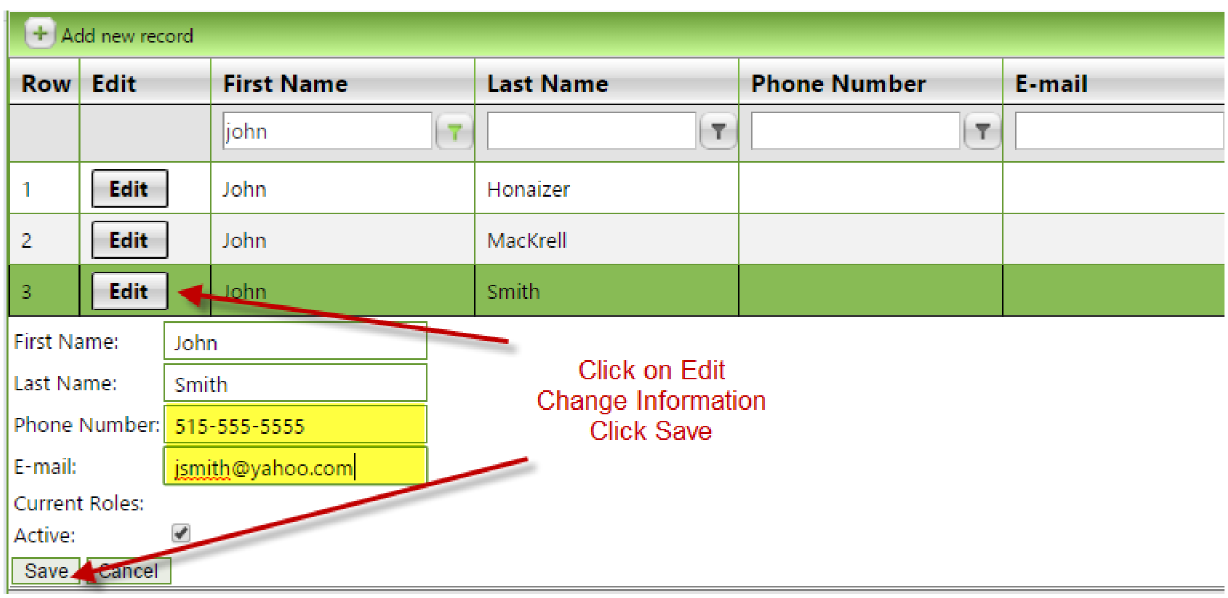


To Add Certificates

Click on Certificates Button



To Edit Personnel Information



To Edit Roles or Certificates, click on the appropriate button, make changes, and Save.