

Assign Positions

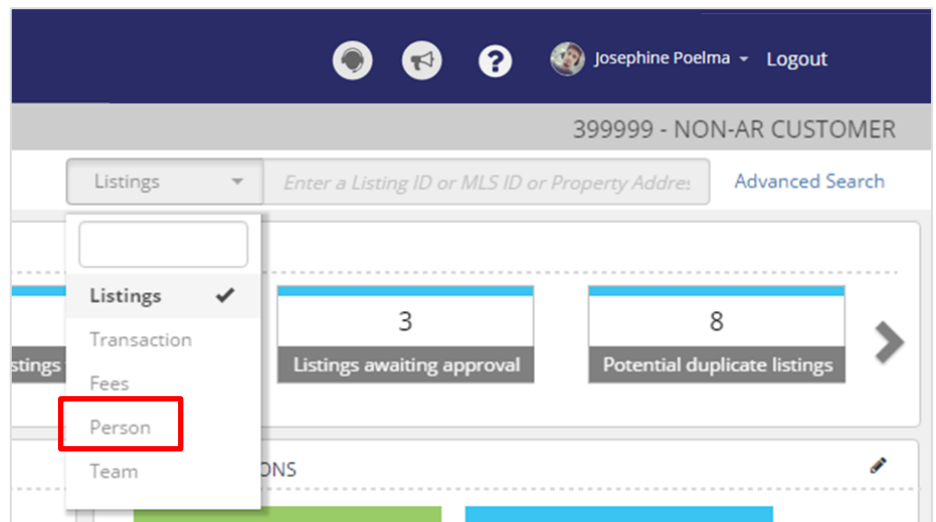
When adding or updating a person in dash you need to assign them a position(s) (i.e. sales and/or non-sales). The position(s) they are assigned to may determine their access level in other brand applications.

For example, individuals with the Learning Administrator or Training Director non-sales position will be able to run learning transcript reports in the brand learning site. Individuals with the Zap Specialist non-sales position will have access to Zap Specialists-only materials on the ezZap page.

For more information about adding a person, refer to the guide **Add a Person**.

Fields marked with an asterisk (*) are mandatory.

1. Click the dropdown list in the Quick Search box.
2. Select **Person**.



3. Type the name of the person.
4. Click the name from the search results.



The **Edit Person** screen displays.

5. Click **Positions**.



To Assign a Non-Sales Position:

1. Scroll down to the **Non Sales Position** section.
2. In the Non Sales Position section, click the dropdown arrow.

NON SALES POSITION

POSITION

POSITION OFFICES EFFECTIVE FROM

-- SELECT --

OFFICES

PRIMARY OFFICE * -- SELECT --

Cancel

3. Select the position to assign to the individual. You can either scroll down the list to locate the position or search for it using the search box.

AWARDS CATEGORY

PRIOR PRODUCTION

NON SALES POSITION

POSITION

OFFICES EFFECTIVE FROM

-- SELECT --

Accounting

Manager

Admin

Assistant

Admin

Coordinator

Assistant

-- SELECT --

4. Click **Modify Offices**.

NON SALES POSITION

POSITION

POSITION OFFICES

Zap Sp

Modify Offices

The **Select Offices** screen displays.

5. Select whether you want to assign the position for the person for the entire company, or for select offices.

Select Offices for Position : Zap Specialist

Entire Company
 Select Offices

4

Use the same Effective Date for all assigned offices

Selecting Company Level will automatically assign the position selected to new offices added in the future.

If you select Entire Company, you will be required to pick an **Effective Date** for the position that will apply to all offices in the company.

This will also automatically assign the position to the person for new offices added in the future.

If you select to assign the position to certain offices, then:

6. In the office selection section, click an office on the left to include the office, or click Select All to include all offices. Click the calendar next to an office to select an **Effective From** date.

To remove an office, click **X** next to the office name on the right.

7. To use the same effective date for all assigned offices, check the box. You would then be presented with a calendar to select the date.

8. Click **Apply** to save your settings.

The Position you've just assigned displays.

9. Check the box if you want to show the person's non-sales position on the public website.

10. To add more non-sales positions to the person, click **+** and repeat the steps.