Managing Employees

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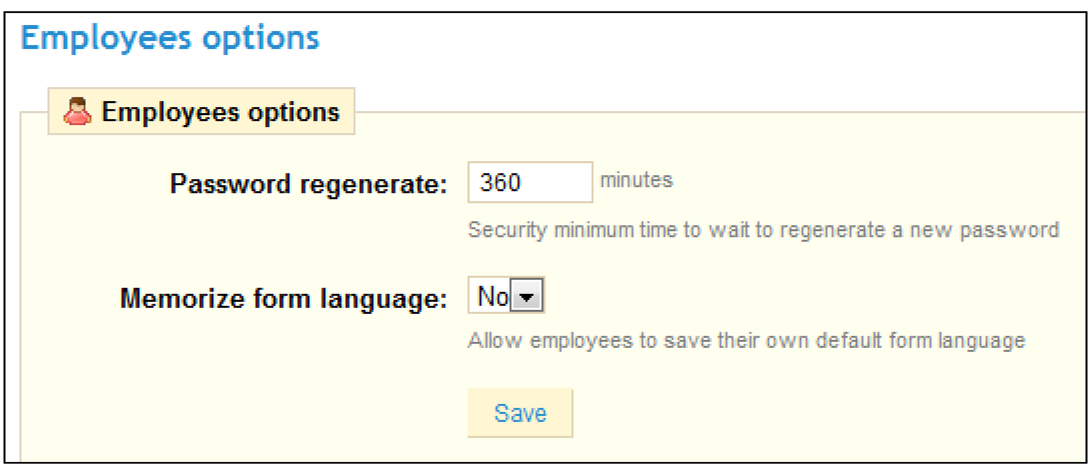
Managing Employees

PrestaShop allows you to assign specific duties and rights to each employee helping to manage the store. For example, the administrator will have access to the entire store, without restriction, while an employee can only have access to the catalog or orders. To configure this feature, go to the "Employees" tab.

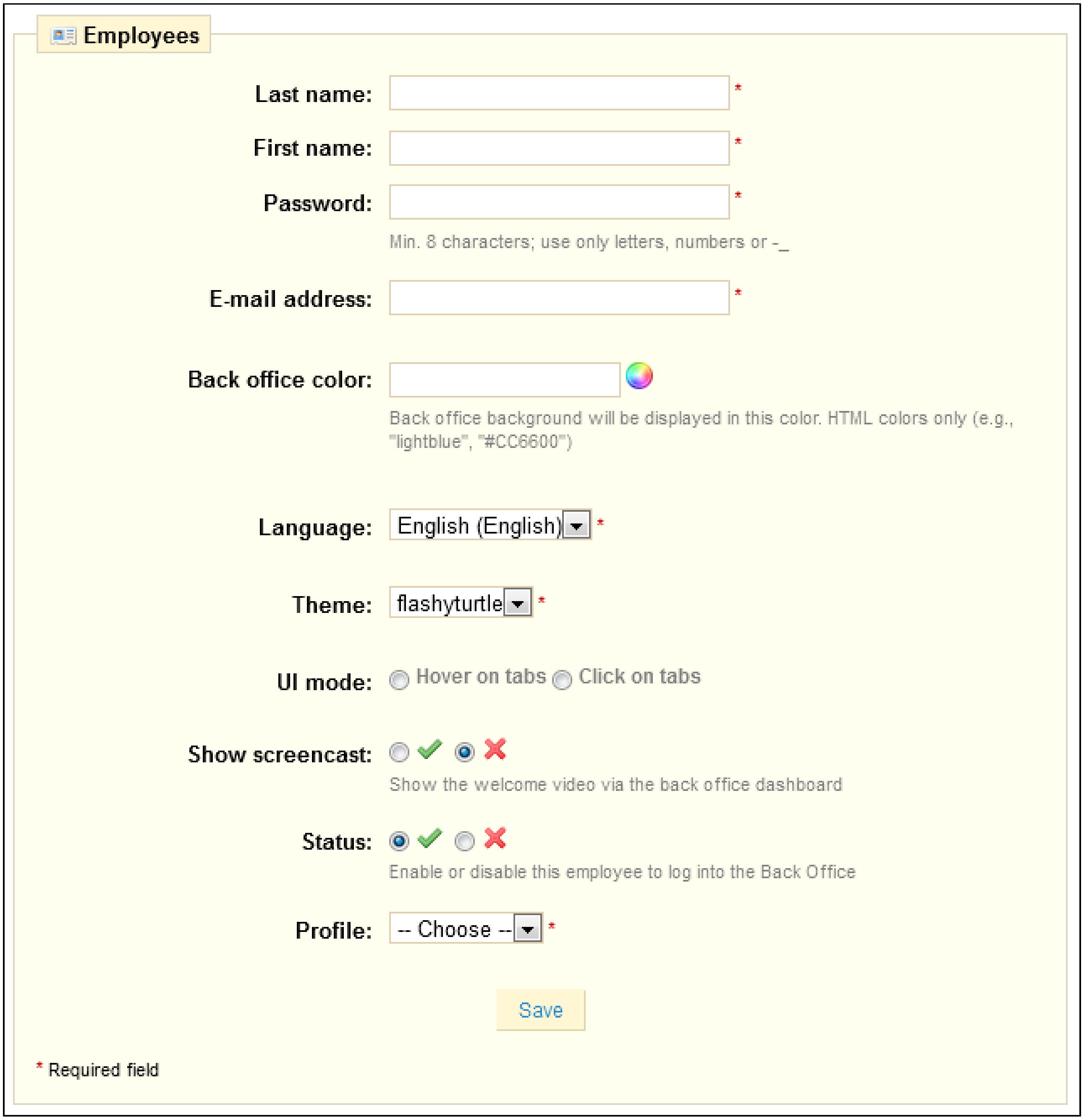
Here you can discover all the accounts that have access to your store. By default you will find the account that was created during the store's installation, which is automatically set as Administrator. The Administrator has access to all of PrestaShop's features without restriction.

At the bottom is the "Employee Options" This section allows you to set the time elapsed before PrestaShop asks you for a new password in order to use the back office of your store.



Add a New Employee

On the "Employee" tab, click the "Add New" link.



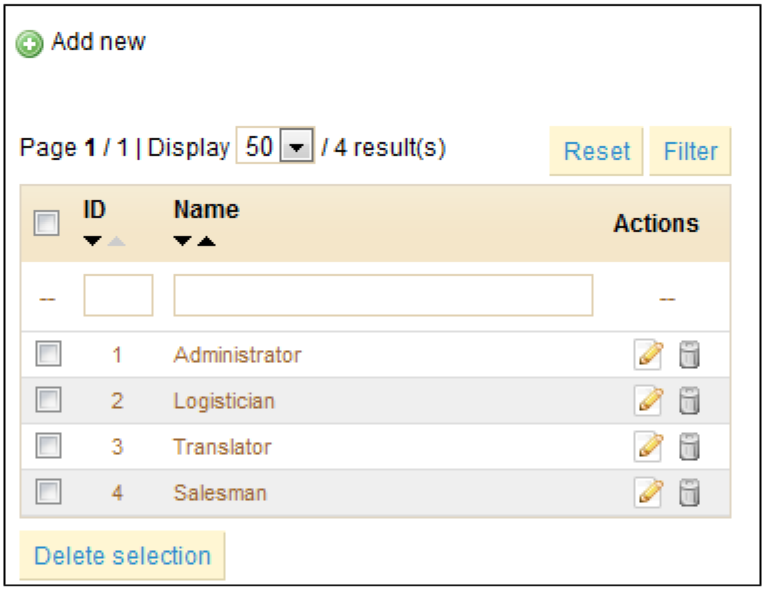
Fill in all fields (first and last name, password, e-mail address, etc.), and at the bottom of the form select the profile for your employee.
This will then apply the permissions you previously configured.
Validate by clicking on "Save." Congratulations! You just created a new account that can be used by one of your employees.

When the employee logs in, only the tabs that have been configured as accessible to them will be displayed.

Create an Employee Profile

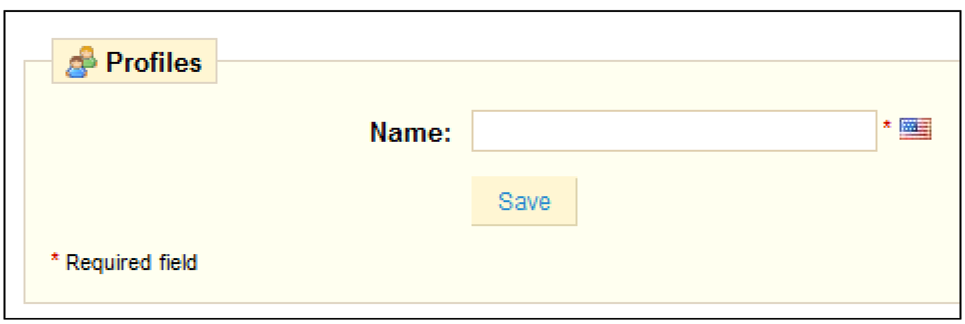
Profiles are ways for you to give more or less rights to your store's employees – for example, a translator should not have access to the same areas than a salesman has.

To create new profiles, click the "Profiles" sub-tab. You will see a summary of all the profiles in your store, as shown in the screenshot.



By default, four profiles are registered: "Administrator", "Logistician", "Translator" and "Salesman".

Click the "Add New" link to access this form:



For this example we will create the profile "Preparer of Orders" by filling out the "Name" field. Once entered click "Save." It will then appear in the list of profiles.

We will now assign permissions to this new profile. To do this click the sub-tab "Permissions". A drop-down menu appears; by default, it displays rights for the Administrator profile (which cannot be changed), so you now must choose the profile you just created in the menu.

A list of 81 criteria will appear.

For each of these criteria you have 5 options:

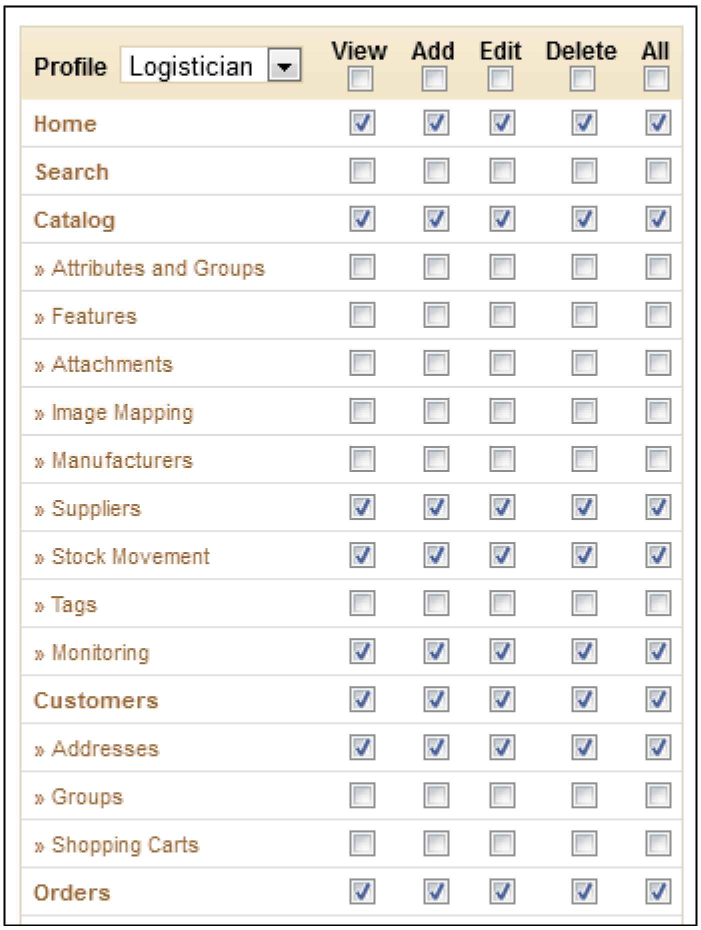
- **View**. Employee can only view information.
- **Add**. Employee can add new information.
- **Edit**. Employee can change information.
- **Delete**. Employee can delete information.
- **All**. Enable all the above options for the current row.

At the top of each column, a checkbox makes it possible to have all the column's checkboxes checked at once. If you click on the All checkbox, all the checkboxes for every row will be checked. You can then uncheck selected rows rather than spending time checking each needed rows one by one.

To avoid mistakes during the configuration of your profiles, PrestaShop automatically saves your settings every time you make a change. Once you have assigned the profile rights, you can return to the "Employees" tab.

Permissions

Permissions are the central part of PrestaShop's profiles. They enable you to see very precisely what an employee account can and cannot do on your shop.



When you click any profile (except Administrator), the table appears to give you access to its menu-related permissions: you can decide what the profile can do with menus. In effect, you could prevent a profile from editing the content of a page, or even hide the menu entirely.

For each of the menu criteria, you have 5 options:

- **View**. Employee can view information.
- **Add**. Employee can add new information.
- **Edit**. Employee can change information.
- **Delete**. Employee can delete information.
- **All**. Enable all the above options for the current row.

The Administrator's permissions cannot be changed: the profile simply has all the rights for every criterion.

Setting permissions for a new profile

For this example we will create a new profile, "Order Preparer". First create the profile in the "Profiles" page, by filling the "Name" field. As soon as it is saved, it appears in the list of profiles.

Then you need to assign permissions to this new profile. Go to the "Permissions" page, and click on the tab for the new profile: the list of criteria appears. By default, a new profile has access to none of the back-office pages, and can only view the impact of some modules on the back-office (for the pages he or she has permissions to view).

You have two ways to fill the criteria, depending on the limits or freedom you want the profile to have:

- Click the permission checkboxes one by one until it has enough access rights to get the job done.
- Have all the checkboxes checked, then remove permissions one by one until it has only the ones necessary.

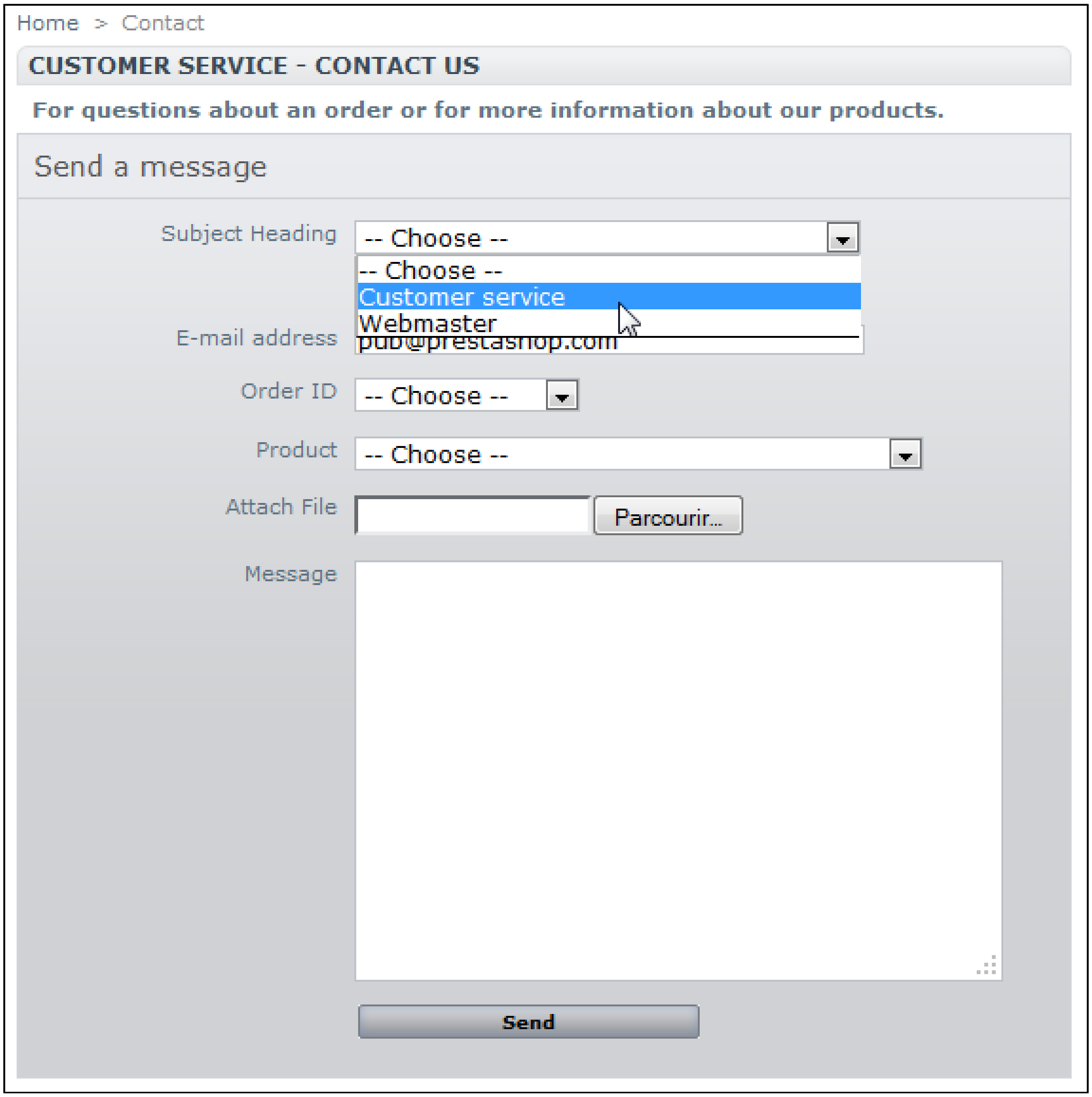
You have two ways to have checkboxes checked in batches:

- Per column: at the top of each column, a checkbox makes it possible to have all of the column's checkboxes checked at once. Unchecking it unchecks all the currently checked boxes.
- Per row: if you click on the "All" checkbox for a given row, all the checkboxes this row will be checked. Unchecking it unchecks all the currently checked boxes.

You can then uncheck selected rows rather than spending time checking each needed rows one by one.

Contacts

To facilitate communication with your clients, you can create multiple contact accounts. For example: customer service, technical support, sales department, etc. This feature allows your customers to directly contact the right person according to their needs. To contact the appropriate division of your store, the customer clicks on the "contact" icon which is at the top of the page, or on the link "Contact Us" at the bottom of the page. He then arrives at the form below.

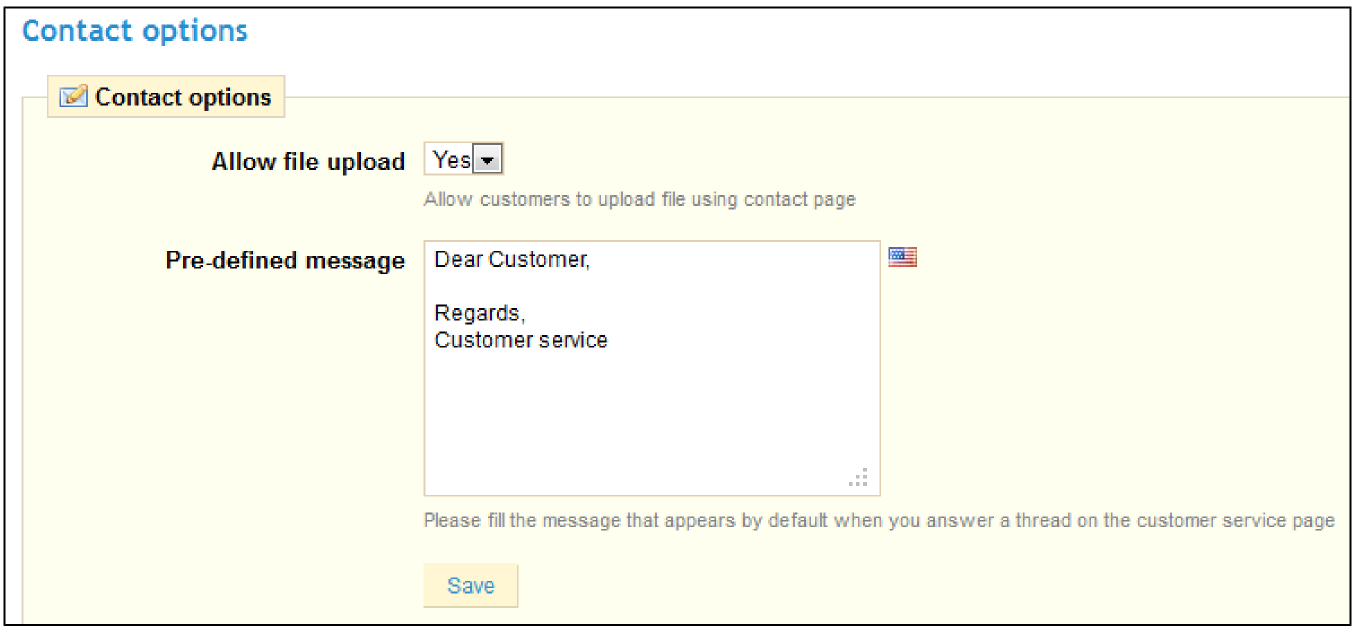


He is then asked to choose the service he wishes to contact, enter his email address and then complete the message. He can indicate which order he wants to discuss, and even which product from that order.

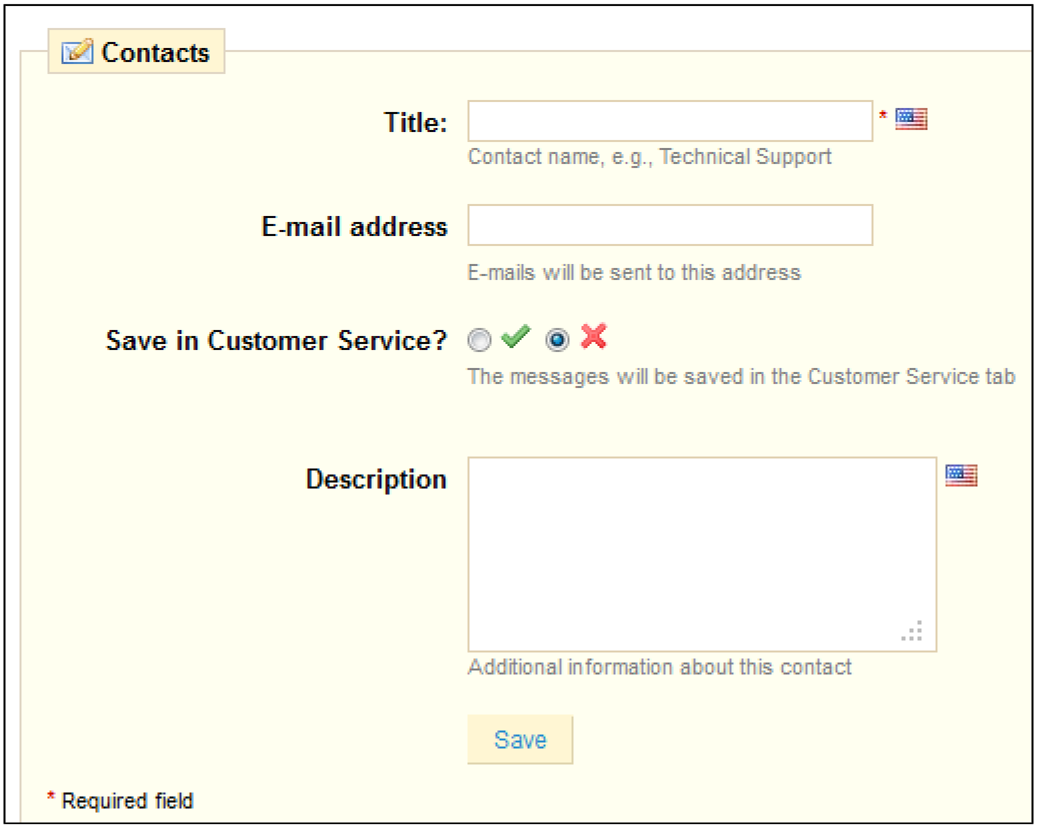
In order for the message to be redirected to the intended recipient, you must configure the contacts in your shop.

By clicking on the "Contacts" sub-tab, you can access the existing list of contacts.

You can edit a couple options at the bottom of the page: whether the customer can attach a file to his message (this can be useful in case of bugs), and the default message (keep it simple, so that it can adapt to many situations, even if it needs a little editing for each case).



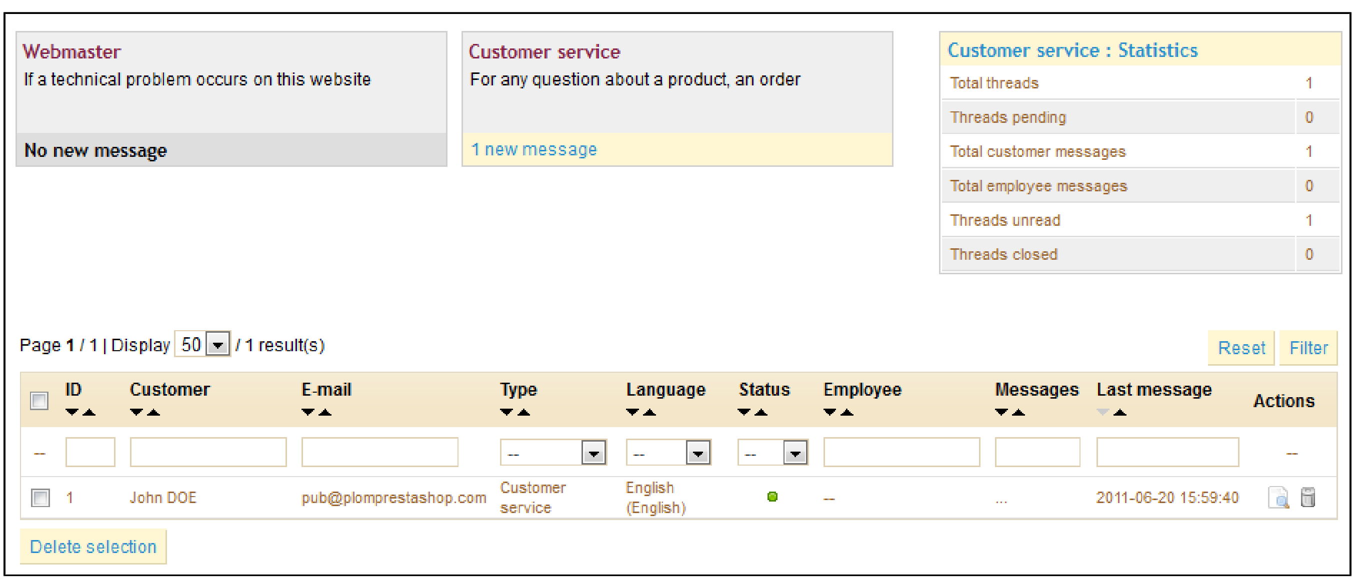
To create a new contact, or edit an existing one, go to the "Contacts" sub-tab under the "Employees" tab.



- Add a title/name for this contact.
- Provide an e-mail address (it can be the same as another contact).
- Indicate if the e-mail is to be saved in the "Customer Service" tab (see below).
- Write a description. Make it short, as it is displayed to the customer in the contact form.

Customer Service

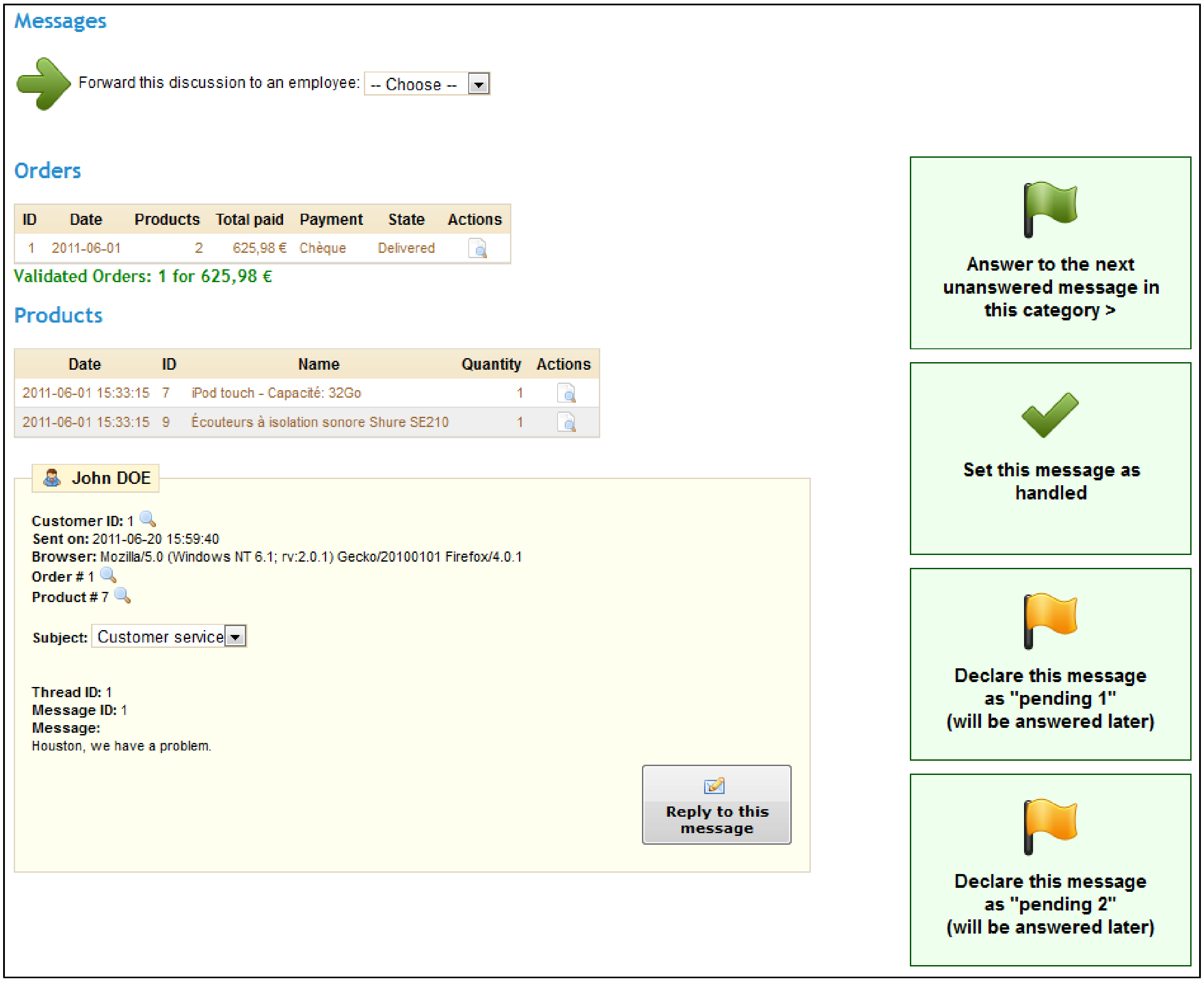
PrestaShop enables you to centralize all the customers' request within its confines. This helps you keep track of which threads needs answering, rather than having to check with all the recipients of the mail to check if someone did answer it – provided the contact used has its "Save in Customer Service?" option set to "Yes", otherwise the message is simply sent to the contact's e-mail address.



Each contact has its own section, where you can quickly see if a there are new messages.

Handling Customer Service Messages

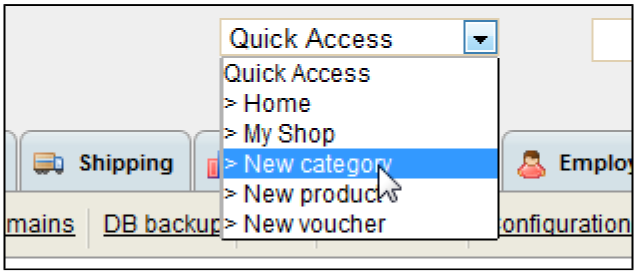
Each message can be handled through PrestaShop's complete interface.



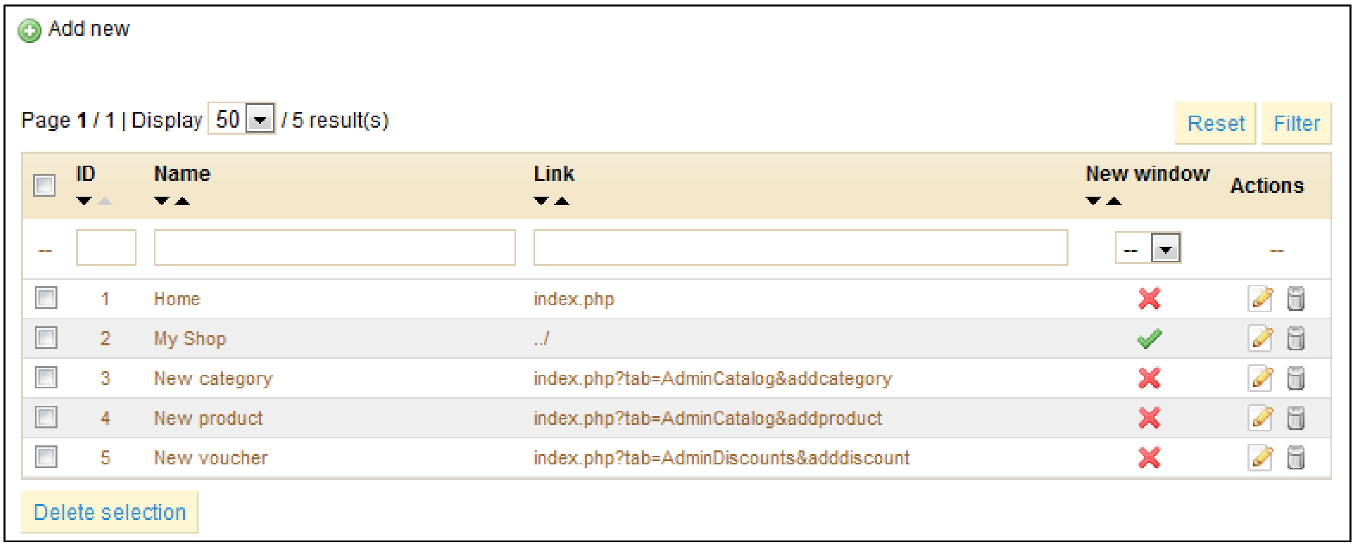
- You can forward the request to another employee, who will receive a notification.
- You can find the details from the request: name or customer, order details, and the message itself. Click "Reply to this message" in order to start the discussion (the form will display your default message, as set in the "Contacts" sub-tab).
- You can manage the request's status using the 4 buttons on the right: keep it unanswered, mark it as handled, and two "pending" statuses, for internal use.

Quick Access

PrestaShop has handy shortcuts to your most important pages, which can be accessed through the "Quick Access" menu, at the top of every page of the PrestaShop back-office.



The "Quick Access" sub-tab enables you to create customized shortcuts in order to make your navigation within the admin area even easier.


Add new

Page **1** / 1 | Display 50 / 5 result(s)

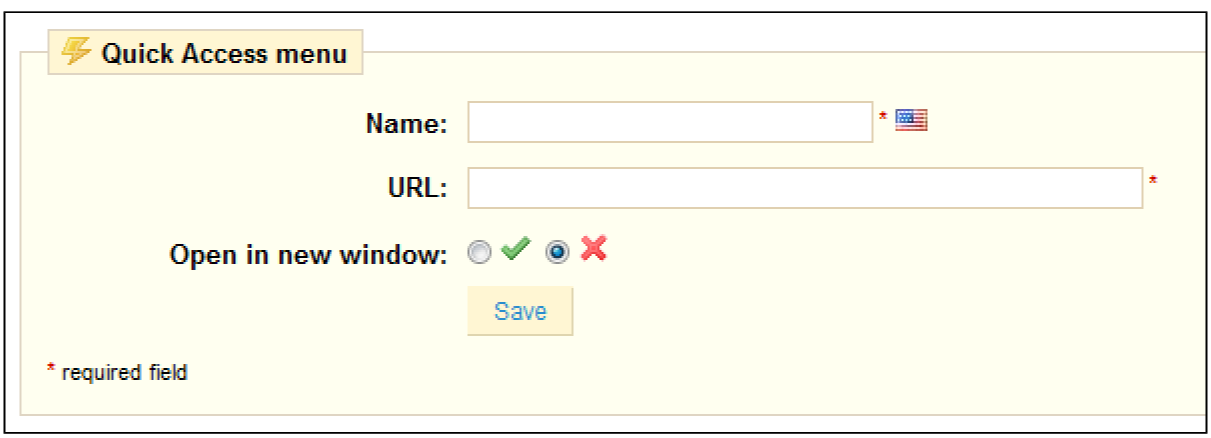
Reset Filter

	ID	Name	Link	New window	Actions
--				--	--
	1	Home	index.php	✗	
	2	My Shop	../	✓	
	3	New category	index.php?tab=AdminCatalog&addcategory	✗	
	4	New product	index.php?tab=AdminCatalog&addproduct	✗	
	5	New voucher	index.php?tab=AdminDiscounts&adddiscount	✗	

Delete selection

The page displays all the shortcuts that have already been created. You can create as many shortcuts as needed – just don't overdo it, obviously.

Click "Add New" to access the creation form.



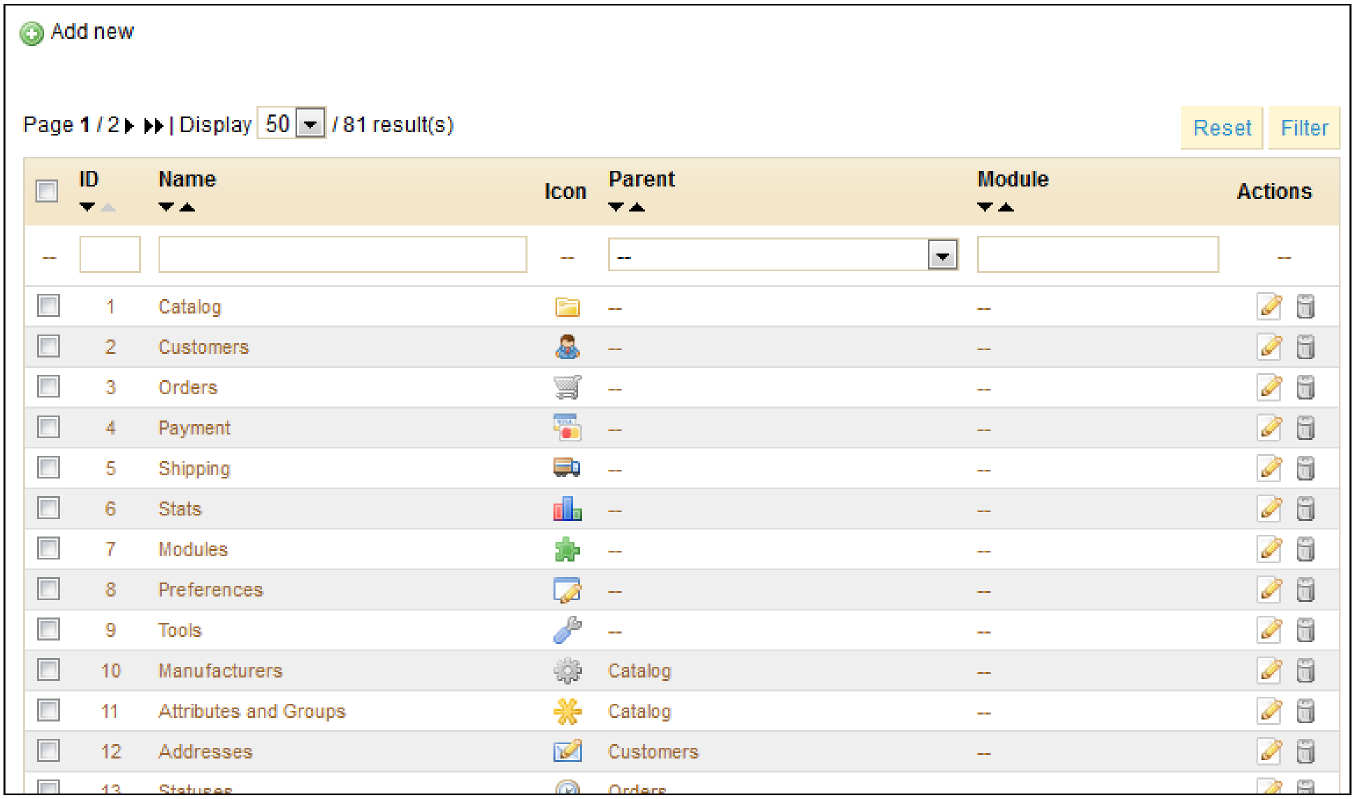
Let's create a shortcut the "Tracking" sub-tab of the "Catalog" tab:

- Give the shortcut a unique name.
- Indicate the page's address.
  - Go to the "Tracking" sub-tab.
  - Copy it's address; for instance, http://www.myprestashop.com/admin42/index.php?tab=AdminTracking&token=6ebfba8b18a50168a20a97fb9614d750
  - Paste the important bits (i.e., not the domain and admin folder, and not the token): index.php?tab=AdminTracking

- Indicate whether you want to have this tab open in a new window or not.
- Save.

Managing Tabs

You can create new tabs for other functions in your store. On the first page, you will see a list of all the tabs in your Back Office.



Add new

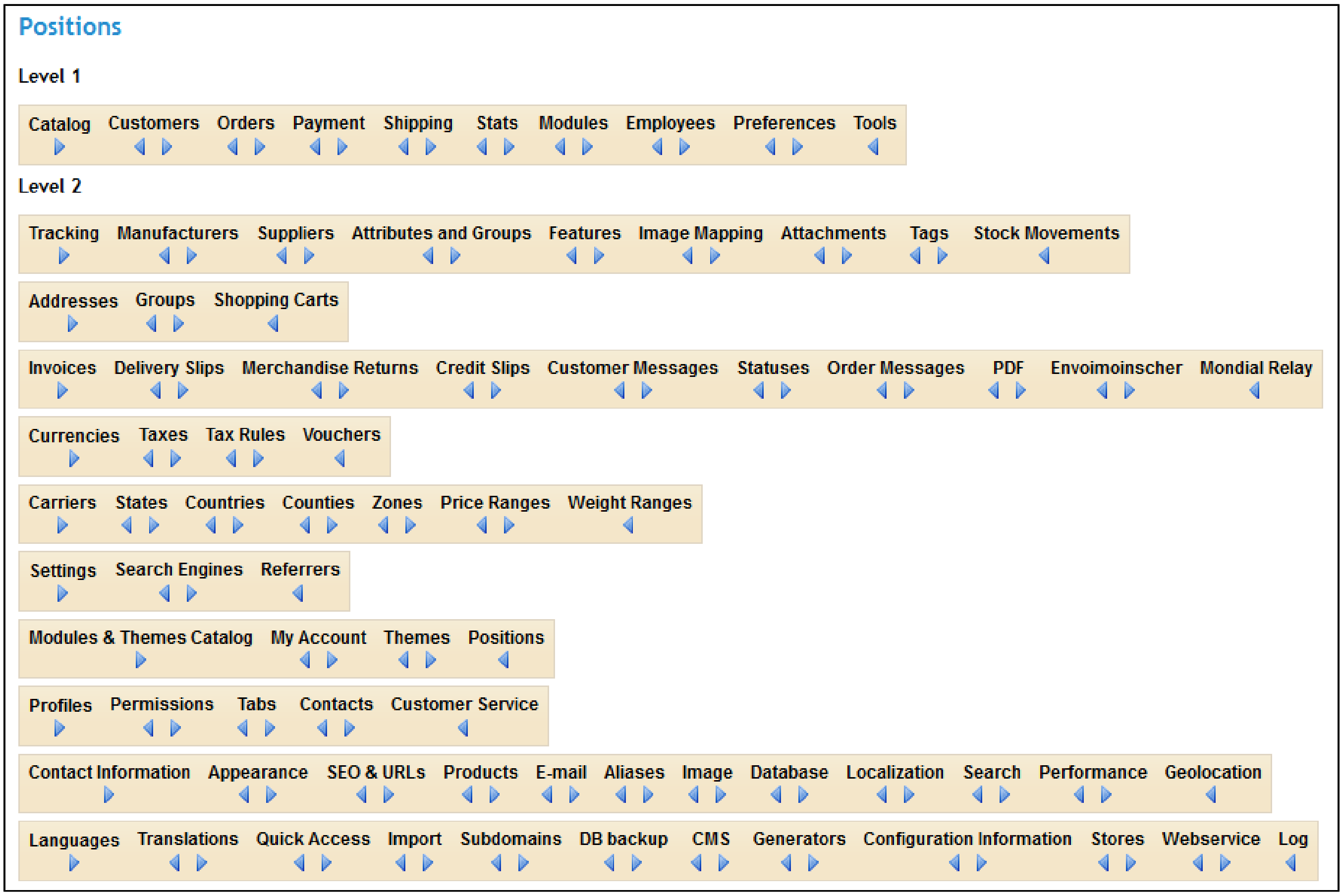
Page 1 / 2 | Display 50 / 81 result(s)

Reset Filter

	ID	Name	Icon	Parent	Module	Actions
--			--	--		--
	1	Catalog		--	--	
	2	Customers		--	--	
	3	Orders		--	--	
	4	Payment		--	--	
	5	Shipping		--	--	
	6	Stats		--	--	
	7	Modules		--	--	
	8	Preferences		--	--	
	9	Tools		--	--	
	10	Manufacturers		Catalog	--	
	11	Attributes and Groups		Catalog	--	
	12	Addresses		Customers	--	
	13	Statuses		Orders		

Moving tabs and sub-tabs

At the bottom of the page, you will find a tool to help you customize the tabs' positions.

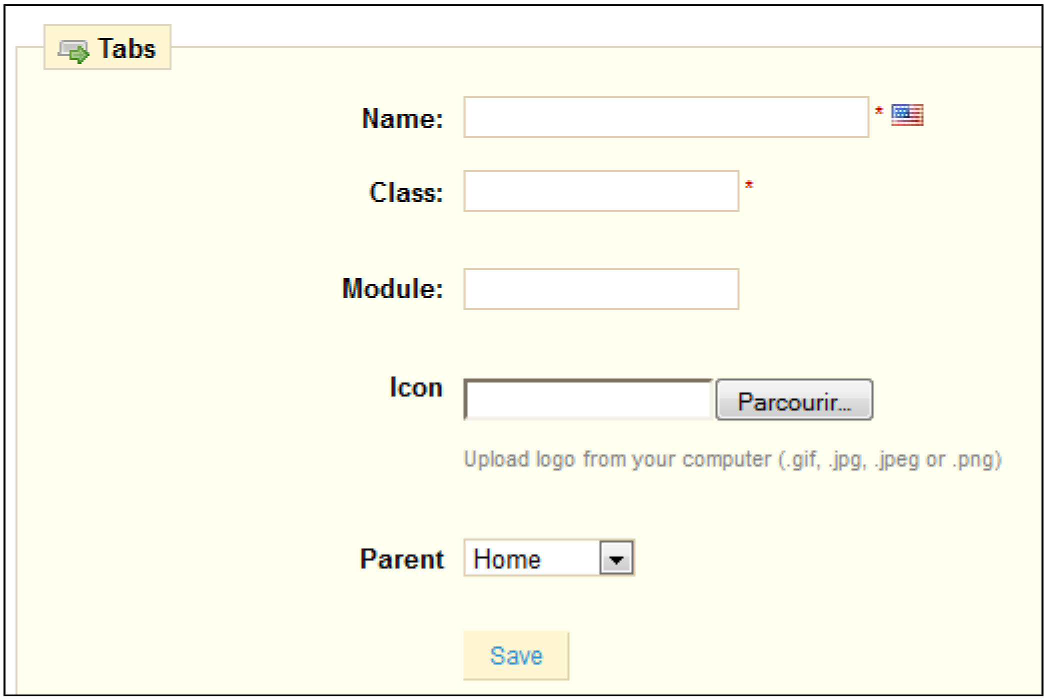


You have access to both tabs and sub-tabs. They are placed according to their order and position in the current tab system. You can change a sub-tab's parent tab by editing it and using the "Parent" drop-down menu.

Click the arrows in order to change a tab or sub-tab's position.

Creating a New Tab

Click on "Add New" to create a new tab.



Define a name, and give it a class. You can assign it a graphic icon.
Choose which existing tab is connected to this tab before saving it. If you choose "Home", then this will be a top-level tab. If you choose "None", you won't be able to reach the tab.