

Steps to add new employees to your Infinity program can vary depending on the type of employee you are adding. All employee types will need to be added as employees and to security.

## Add the Employee

1. Click on the Employee Setup module from the menu on the left side of Infinity's main screen.
2. Choose the Add button at the bottom of the screen.

Employee Setup window showing employee information and pick lists.

Entity # 524406 Prospect  Hired 10/23/2020 Terminated  Ini Loc  Cur Loc

Employee # 524406 Address 123 Sample St Home Phone (407) 358-2000 Company Number 1

Last Name Doe Address2 Apt A2 Work Phone ( ) - - Ext.

First Name Jane MI City KISSIMMEE Cell Number ( ) - - Prov.

Prefix  Suffix  State FL Zip 34743 Email janedoe@companyemail.com

Main Mechanic Addtl Addresses

No Security User For This Employee

Cash Drawer Number

Cash Drawer Position

Team Number

Default Scanner Group

Salespersons License Number

External Payroll Employee #

Default Department:

Employee Pick Lists Default Position

Salesperson  Mechanic  Parts Manager  Rental Sales  Service Dispatcher

Sales Manager  Receptionist  Parts Cashier  Service Cashier  Service Warranty Clerk

Finance Manager  Parts Sales  Payroll  Accounting Department  Service Advisor

Delivery Specialist  Service Parts Sales Pick List

History Managers Add Save Search List Cancel Exit

3. Enter the employee information, including a hire date.
4. Check the box for the pick list that the employee will belong to. This allows the employee to show in the relevant rotation.
5. Choose to save. You can now exit the Employee Setup module.

## Add to Security

6. Click on the Security Management module from the menu on the left side of Infinity's main screen.
7. At the top of the security page press the new user button. This looks like the head and shoulders of a single person. This button will open the new user window.

Security (1)-Current Release LOC1 - [Infinity Users and Groups]

File Edit Help

| User Name | Type | Employee Name |
|-----------|------|---------------|
|           |      |               |

**New User**

User Name: jane.doe

Employee Number: 524406

Password:

Confirm Password:

License Type: Full

User Options

- User cannot change password
- Password never expires
- Account is disabled

Create Close

8. Enter a name for the user into the User Name field. We recommend that the username here is in the format of firstname.lastname
9. Click the drop-down menu for Employee Number to select the new employee's number. Alternatively, you can type the number here to locate the employee in the list.

**New User**

User Name: jane.doe

Employee Number: 524406

Password: [ ]

Confirm Password: [ ]

License Type: [ ]

User Options:

- User cannot cha
- Password never expires
- Account is disabled

| EmployeeNumber | FullName         |
|----------------|------------------|
| 090943         | JAMES WALL       |
| 490757         | JAMES YOUNGS     |
| 524406         | Jane Doe         |
| 512084         | Jane Smith       |
| 507451         | Jason David Fran |
| 507274         | Jason Luetzow    |
| 91168          | JASON SAVILLE    |
| 317592         | JASON SPRAKE     |

Buttons: Create, Close

10. Enter a password into the 'Password' and 'Confirm Password' fields, ensuring that they match. There are no limitations for entering a password on this screen, so it can be any length.

**Important Note:** If the user will be logging on to the server using an NT account (logging into Windows), they will not need to remember this password.

11. Select whether this account will be using a Full or Partial license from the drop-down.

- **Full Licenses for Users:** Access to all modules (with proper security clearance) to Unit inventory, CRM, Finance, Parts & Service, Accounting and Reports.
- **Partial Licenses for Sales Reps:** Gives a Sales user access to basic functions in CRM, Unit Inventory (not including financial information), and Deal Desking (Buyers Order tab only).
- **Partial Licenses for Mechanics:** Gives a mechanic the ability to clock in/out on repairs, as well as to request parts from the Parts department. Also gives the user access to the productivity module, which consists of an email program that allows mechanics to make notes about the repair, create & assign tasks, send out emails, and access personal and company calendars.

12. Optionally, you may check any of the boxes at the bottom of the window.

13. Click the Create button to save the new user.

### Add the Employee to a Security Group.

1. Double-click over the employee in the list to open the employee record.
2. Choose the Member Of tab at the top of the record.
3. Click the Add button.

4. Choose the group or groups that the employee's permissions will follow. This allows the employee to be able to perform their job functions in the software.
5. Select to save.

**If the user that you have added is a mechanic or salesperson who will only log in to the mobile app on a tablet and will not use a computer, you may stop here.**

**If this user will log into a computer and your data is hosted by Motility, please follow the directions in the following section.**

## **Send Add User Request**

Please send an email to [support@motilitysoftware.com](mailto:support@motilitysoftware.com) to have our team set up the new user to show in your AD Panel.

Include the employee's name and username in your email, and please verify that the username you provide matches the username entered into the employee's security profile.