

# Employee Setup

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A sign-off process is not required, however is highly recommended in larger companies (refer to the [Credit Requests Planning](#) topic). For each employee that will be involved in the Credit Request sign-off process, a selection must be made in the *Supervisor and Credit Request Handoff* field of the *Employee* setup form within SedonaSetup. This will define to whom a Credit Request will be assigned.

The only employee that does not require the *Supervisor and Credit Request Handoff* be populated would be the employees that have the authority to generate the Credit Memo and do not need to assign the Credit Request to any other employee. In the Employee setup example provided below, there are three levels of sign-off, Amanda, then Vicky, then Carolyn; Amanda may enter a Credit Request and it will automatically be assigned to Vicky for approval. Vicky may approve the request then handoff the Credit Request to Carolyn who will either approve the request and generate the credit memo or decline and close the Credit Request.

The image displays three overlapping screenshots of the 'Employee Setup' form in SedonaSetup. Each form is for a different employee, and the 'Supervisor & Credit Request Handoff' field is highlighted in yellow in each. The forms are as follows:

- Top Form (Amanda Watson):** Employee Code: amanda.watson, User Code: amanda, Type: CL, Assigned To: Accounting, Supervisor & Credit Request Handoff: Vicky Catone. First Name: Amanda, Last Name: Blake.
- Middle Form (Vicky Catone):** Employee Code: vicky.catone, User Code: VickyC, Type: CL, Assigned To: Accounting, Supervisor & Credit Request Handoff: Carolyn Jackson. First Name: Vicky, Last Name: Catone.
- Bottom Form (Carolyn Jackson):** Employee Code: Carolyn.Jackson, User Code: Carolyn.Jackson, Type: MG, Assigned To: Accounting, Supervisor & Credit Request Handoff: (blank). First Name: Carolyn, Last Name: Jackson, Date of Hire: 7/1/2009.

Each form includes tabs for 'General Information', 'Payroll', and 'Commission Setup'. The bottom form has 'Apply', 'New', and 'Delete' buttons at the bottom right.