



Employee Management Best Practices

The 3 primary methods to upload employees to your Uniform Store are as follows.

1. Upload lists of employees in bulk via a Microsoft Excel or .csv sheet
2. Manually add individual employees one at a time
3. Allow employees to register their own account either with or without administrator approval.

Self Registration - Our recommended best practice to manage your Uniform Store employee base is to allow employees to self register their own account at hire. This will reduce the workload on your or your Uniform Store administrator to upload those employees at hire.

With **self registration enabled with admin approval**, simply provide your employees and new hires with the custom URL for your Uniform Store and upon the employee's registration, their account will be routed to the admin portal for approval. (Note, self registered employees awaiting admin approval will not be able to make a purchase on the site until approved). We typically recommend utilizing the admin approval feature for 2 primary reasons.

1. Admin approval allows for all employee information to be reviewed and validated prior to being able to purchase. This removes the risk of an employee registering for an incorrect department, location, etc... and ordering from an incorrect apparel collection.
2. This review and validation process will also remove the opportunity for employees to register incorrectly and receive an improper allocation amount.

For information on the approval process see "How to Approve a Self Registered Employee".

With **self registration enabled without admin approval**, you can provide your employees with your custom URL like above. However, when those employees register their accounts they will be automatically approved. We would recommend using this feature only on sites that do not assign any employee allocations. It's important to keep in mind that any site using auto-approval, will allow anyone with the custom Uniform Stores URL to order from your site and receive allocation funds if applicable. If using auto-approval we recommend restricting your site to only allow people with your company email domain(s) to register.

Self registration with conditional approval is the third and final set up for self registration. This feature is intended for uniform programs where only some employees receive an allocation. With this setup, only employees registering for a department, location, etc... that will receive an allocation to be approved by a Uniform Store Administrator. Any employees registering for a department that does not receive an allocation, will be automatically approved. We also recommend restricting your store to only allow users with your work email domain(s) to register.

Bulk Employee Uploads - We recommend uploading the existing employee base for your organization who should have access to the site prior to launch and sending out invitations to



that employee base. This encourages wider adoption of the uniform program at the time of launch. Utilizing the Uniform Stores bulk upload template will also help when adding several employees at one time and is ideal for cases where employees are not able to self register for their Uniform Store. For more information about this feature see “[How to Bulk Upload Employees to your Uniform Store](#)”.

Manually Employee Uploads - We recommend utilizing the “add employee” feature with the employee dashboard of the admin dashboard for one-off new hires. To add one employee at a time, follow the steps outline in “[How to Manually Add an Employee to your Uniform Store](#)”

Delete employee accounts upon termination. This will ensure that terminated employees do not have access to purchase from your Uniform Store. It will also ensure that any allocation funds remaining on their accounts are inaccessible.