

"To know I can check and see how the store is doing even without being there is very helpful."

Reveille Joe Coffee, Coffee Shop

**Questions?**Call us at **1-877-270-3475** 

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Both

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## Setting Up and Editing User Roles

The **User Roles** screen allows you to customize what features each of the pre-defined roles (Time Clock Only, Cashier, Cashier Plus, Store Manager, and Account Manager) can access on both the POS app and the Back Office. Simply select or unselect the box for each feature. Once you have defined your user roles, then you can assign each employee a role from the **Employees** screen. While you cannot add a new user role or edit the name of a user role, you can define the features you want to associate to each user role.

Refer to Understanding Features & User Roles to learn what assigning and unassigning features will mean to your users.

Select **EMPLOYEES** > **USER ROLES** to display the **User Roles** screen. The **User Roles** screen has a lot of information on it, so we are showing portions of the screen for your reference. Make the feature selections for the user roles that best fit your business needs and then select **Save**.



lack Office Access (All)				<b>V</b>	✓	
My Store (All)	E		E	V	V	
Activity Summary and Alerts				✓	V	
Sales Dashboard	100			✓	V	
Customer Dashboard		m	m	<b>V</b>	IJ.	
Results (All)				✓	V	
Reports (All)				<b>V</b>	7	
Operations (All)				<b>∀</b>	₩.	
Close Shift/Day	E	E		✓	V	
Store Summary				<b> ✓</b>	₩.	
Device Activity	E		E	✓	V	
Employee Activity				<b>V</b>	₩.	
Location Activity				<b>✓</b>	V	
Discounts & Offers	m	PT	m	<b>V</b>	IJ.	
Price Overrides	100			✓	V	
Taxes		[m]		<b>V</b>	IJ.	
Time Clock				✓	V	
Tips		[7]		<b>V</b>	√	
Sales (All)				✓	V	
Item Sales	E	E		<b>✓</b>	V	
Modifier Sales				<b>✓</b>	₩.	
Sales Summary	E			<b>✓</b>	V	
Customers (All)				<b>V</b>	✓	
Bulk Email				✓	V	
Customer Notes				<b>V</b>	V	
Customer Sales	ET.	The second second	F1	V	V	

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Lists (All)			E3	<b>V</b>	V
tems				<b>V</b>	✓
Customers			E	<b>V</b>	[V]
POS Transactions			PT .	<b>V</b>	V
Credit Settlement			E	<b>V</b>	[V]
Inventory (All)			<b>V</b>	<b>V</b>	V
Categories and Items			E	<b>V</b>	V
Modifiers			200	<b>V</b>	(V)
Discounts			E	(V)	V
Manage (All)		E	<b>V</b>	V	V
Snapshot			V	V	V
Count		F	<b>V</b>	<b>V</b>	V
Receive			V	<b>V</b>	V
Customers (All)				<b>V</b>	V
Email Marketing		E	E)	V	[V]
Customers			(10)	<b>V</b>	(V)
Social Sharing			E	<b>V</b>	V
Employees (All)		[17]		<b>V</b>	[V]
Employees				V	V
Time Clock		[11]	[17]	[V]	V
User Roles			E	V	V

Settings (All)	[89]		FT.	₩.	W.	
Company			E5	V	(V)	
Store			pm	₩.	W.	
Taxes			E3	<b>V</b>	(3/2)	
Payment Methods			87	₩.	W.	Ξ
Account Information (All)			E2	V	2	
My Account	[17]	200	(F)	PT	Q*	
Buy Hardware			E	V	V	
Register Hardware				PT	V	
Register Device *	PT PT	E	FF	V	(9)	*

