

Employee Permissions

Setting Employee Permissions

1. Using the back office you can add and manage your employees. This including setting up custom job types, permissions, and log in credentials for anyone working.
 - Start by heading to the employee tab in the back office. Here you will be able to see and modify any employees that you have set up. The master account with your main email will already be shown.
 - To add a new employee simply click the “Add” button.

The screenshot shows a web application interface for managing employees. At the top, there is a navigation bar with several tabs: 'Employee', 'Department', 'Inventory', 'Settings', 'Reports', 'Import', 'Database Settings', and 'Help'. The 'Employee' tab is circled in red. Below the navigation bar, the main content area is titled 'Employees'. In the top right corner of this area, there is a red 'Add' button, also circled in red. Below the title, there is an 'Employee Lookup' section with a search input field labeled 'Search Employee FirstName' and a search icon. Below the search section, there is a table with the following data:

Employee ID	Email	First Name	Last Name
1	sircle1@sirclepos.com	First Name	Last Name

2. Enter relevant general employee information.
 - From here you can input your employee’s name, email, etc..

- Once you finish with the general information you can edit either “Access to POS” or “Access to Back Office”.

Employee Details

Employee Information

Please do not enter special characters in any of the fields. Example: *, /, ', " etc.

Employee ID

Auto-Generated Value

First Name

John

Middle Name

Last Name

Smith

Email

test@test.com

Birthday

1

/

1

/

1980

mm/dd/yyyy

Access to POS

Access to Back Office

3. Job Codes and Permissions.

- You can edit and designate different job codes by using the “Edit Job Code” button. For example, cashiers might have some basic permissions but managers would have them all.

Access ID

Admin Access

Employee Permissions

Job Code **Edit Job Code**

Job Code Description Price Change

Quantity Change Delete Button

Discount Button Shift Report at Shift End

Open Cash Drawer Negate Invoice

Recall Invoice Sell Non Inventory

- The “Edit Job Code” button will become a “Save Job Code” button while you are making edits. When you are done editing job codes you can assign them to employees and save your choice.

Employee Permissions

Job Code **Save Job Code**

This will affect all the employees that have this job code.

Job Code Description Price Change

Quantity Change Delete Button

Discount Button Shift Report at Shift End

4. Back Office Access.

- If you would like certain employees to be able to access the back office you can use this window to set this up.
- Simply create an email and password for any corresponding employees and save them. They will now be credentials for logging in.

Access to Back Office

Email

test@test.com

Password

Confirm Password