triniteq

POWEREPOS GUIDE

Set up Access Roles

Access Roles make it easy to set up new users in PowerEPOS, assigning them the permissions they need to do their job while providing a high level of security to your business-critical system. By allowing only pre-approved users access to certain front-of-house buttons and functions through Access Roles, you decide who is allowed to view, change or process discounts, voids, error corrects and refunds, as well as access POS reports, change prices, create custom products and loads more.
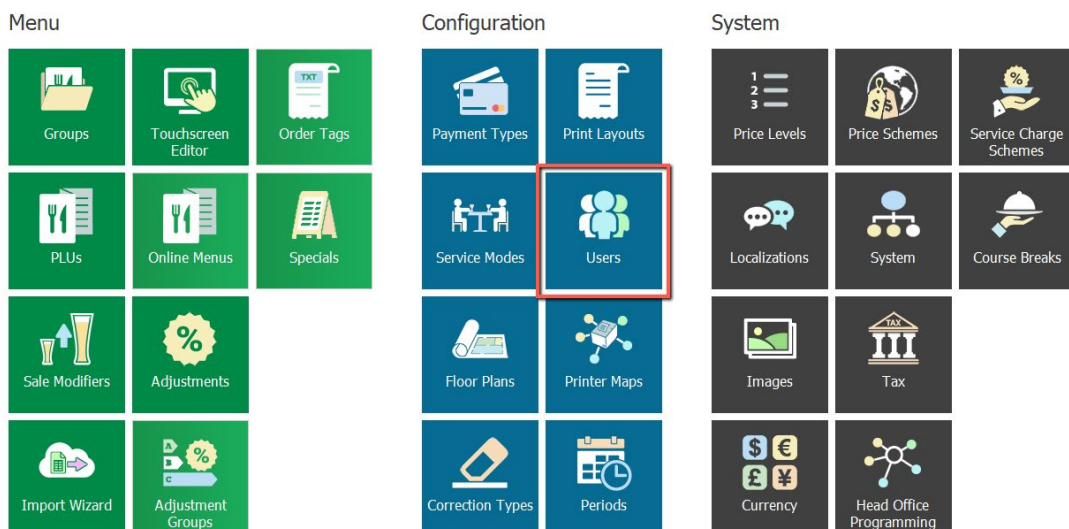
Learning areas:
- Add a new Access Role and configure settings
- Publish Access Role settings
- Tips and tricks for using Access Roles

Before you begin:
Ensure you have access to the PowerEPOS back office, and you have the necessary permissions to make changes to **Access Roles**.

1. Add a new Access Role & configure settings

1. From the **PowerEPOS Management** screen, open Users.

2. **Access Roles** are located on the left of the **Users** screen. To add a new **Access Role,** select **Insert** directly under **Access Roles**.

3. Enter a name.

4. Using the **Flags**, **Adjustments**, **Correction Types** and **Paid In/Out Types** buttons, we set up the persmissions for this Access Role. These control what this Access Role can access and use in the front-of-house POS. **Flags** provide more infomation in blue when clicked. Then we **Save** our new Acess Role.
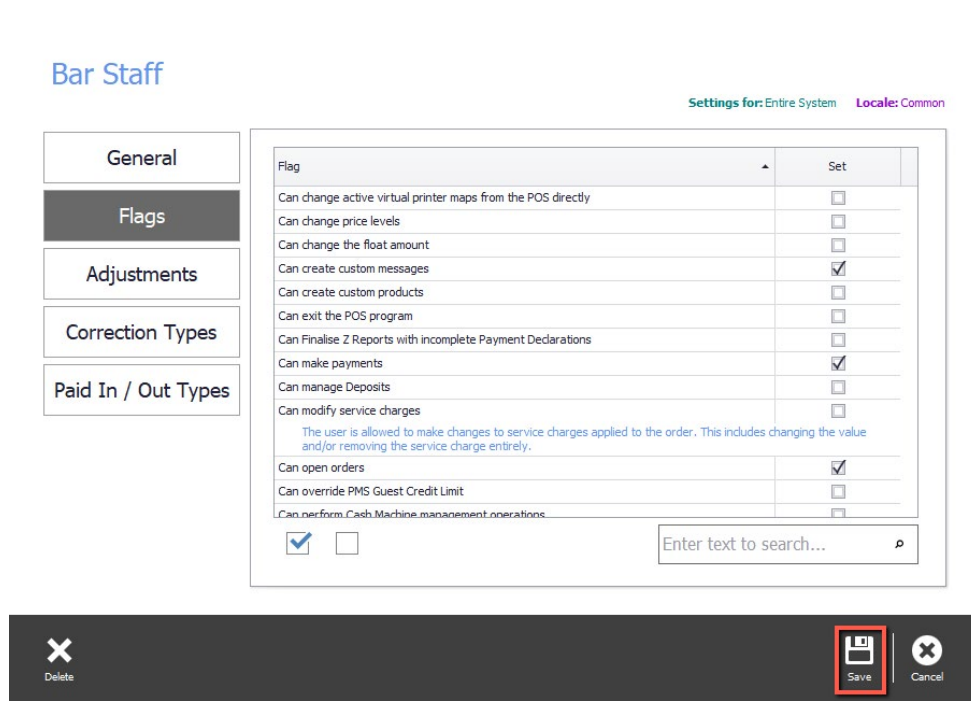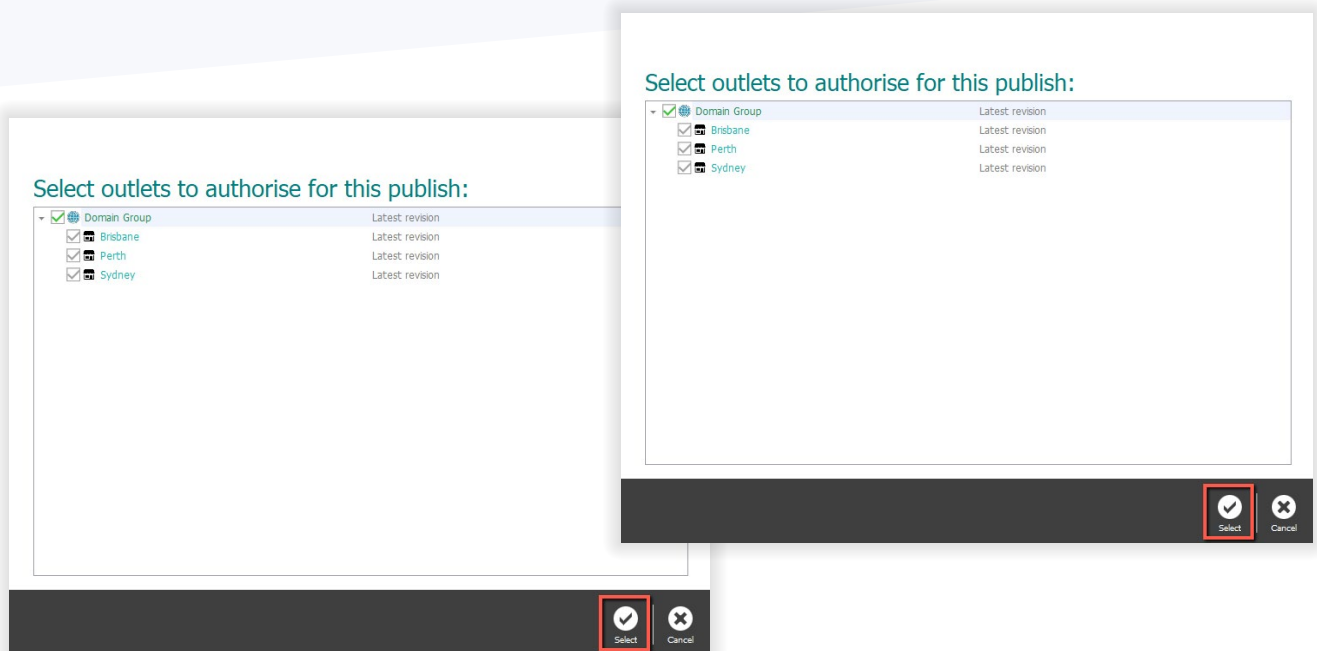

2. Publish Access Role settings

4. From the **POS Management** screen, select **Publish**, top right of the screen.

2. Select the changes and locations to publish to. Then our new Access Role is set up and ready to use.

3. Tips & Tricks

1. Click on an Access Role to display the Users assigned to that Role.
2. Double-click to open an Access Role.
3. Right click on an existing Access Role to **Insert**, **Change** or **Delete** an Access Role.

Need more info?

If you still have questions or need further help, just contact us.

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