RekordPOS | Quick guide

Give every person their own sign in.

Choose exactly what each of them may see and do.

Never share the owner login. Give each cashier, storekeeper or manager their own, with only the permissions the job needs. Then every sale and every change can be traced to a person, and a cashier cannot open your profit reports.

IN THIS GUIDE

1. **Add a role**
   A name, a sign in and a password
2. **Tick what they may do**
   Read, Create, Update and Delete, feature by feature
3. **They sign in**
   With the sign in name you set
4. **Change it any time**
   Edit the role when the job changes

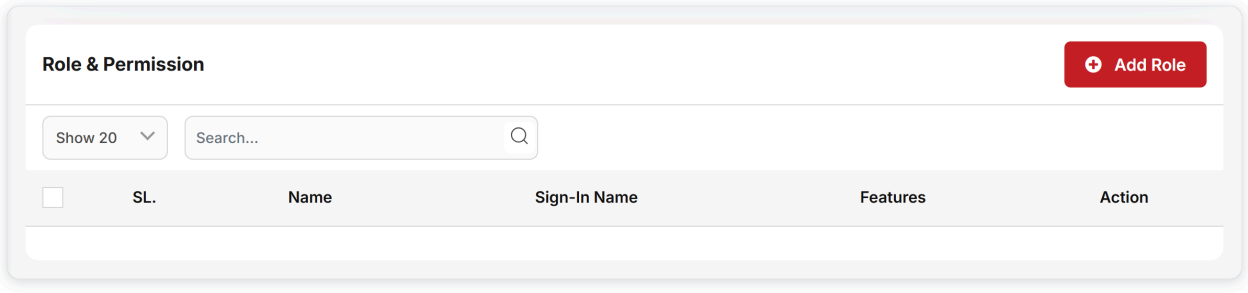
WHERE
Settings, then User Role

TIME
Two minutes per person

TIP
Start with the least access

1 Open User Role

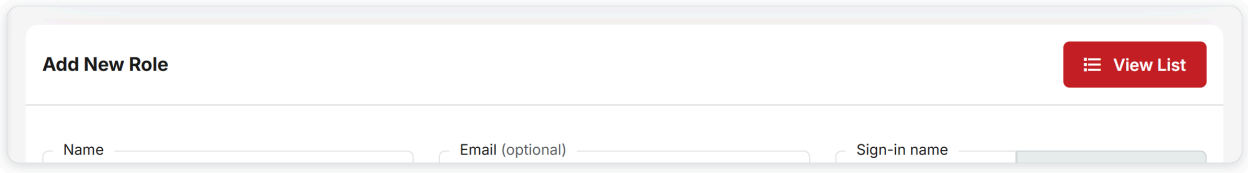
Go to **Settings** and open **User Role**. Each person you add is a **role**: a name, a sign in and a set of permissions. Press **Add Role** to make the first.



The role list. Each row is one staff member.

2 Name and sign in

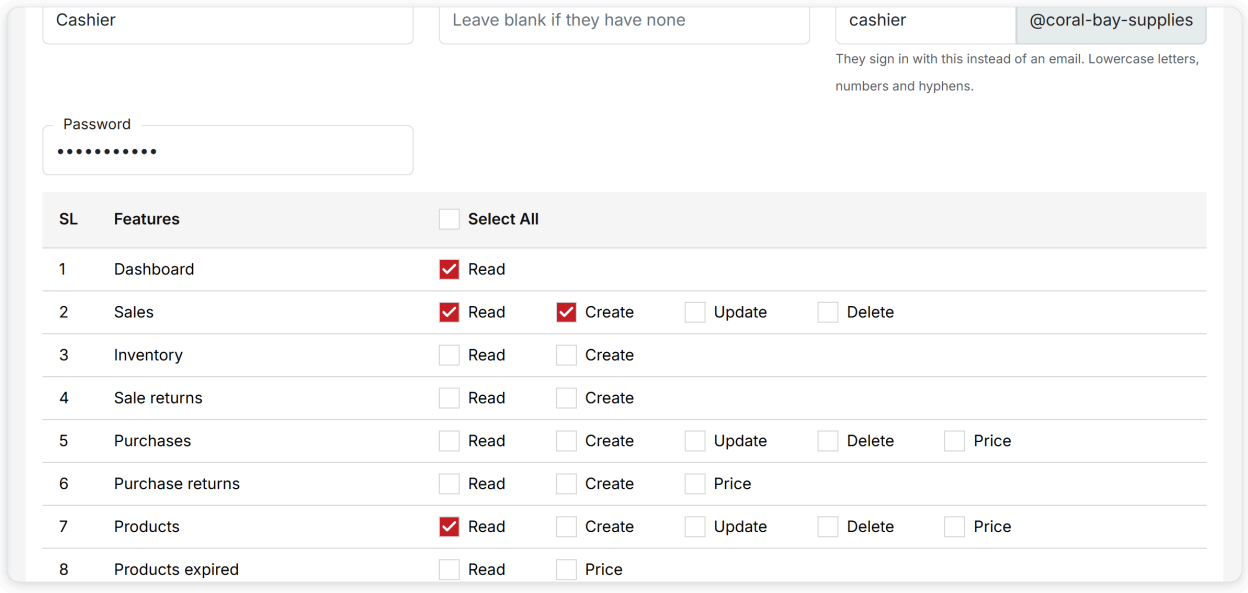
Type the person's **name**. Their **email is optional**: leave it empty if they have none. Instead you give them a **sign in name**, such as **cashier**. The shop name is added after it for you, so they sign in as **cashier@coral-bay-supplies**. Set a **password** and tell the person.



Name, optional email, sign in name and password

3 Choose what they may do

Below the name is a table of **features**, one per row. Each row offers only the actions that make sense for it. **Read** lets them see it, **Create** lets them add, **Update** lets them change, and **Delete** lets them remove. Some rows add **Price**, which shows cost prices and profit. Tick **Select All** to grant a whole column at once.



Tick the boxes this person needs

A cashier usually needs: Dashboard Read, Sales Read and Create, Products Read, and Parties Read and Create. Leave Delete, Price and every report unticked.

4 Press Save, and test it

Press **Save** at the bottom. Then sign out, sign in as the new person, and look around. Anything they should not see will be missing from their menu. If something is missing that they need, edit the role and tick it.

5 Good habits

One person, one sign in

Never share a login. When something goes wrong you can see who did it, and you can switch off one person without disturbing the rest.

Hide the money

Keep Price, profit and the report pages for the owner and the manager. Cashiers rarely need them.

Change the job, change the role

When a cashier becomes a manager, edit their role. Do not give them yours.

Leavers

When someone leaves, remove their role the same day, and change any password they knew.

6 If a person cannot sign in

Use the whole sign in name

It is the name you set, then the at sign, then your shop name. For example cashier@coral-bay-supplies.

Passwords

Edit the role and type a new password for them. Nobody, including us, can read an old one.

They can sign in but a page is missing

That is the permission working. Tick it in their role if they should have it.