Creating new users

Customer Services

Sparkstone Technology Ltd

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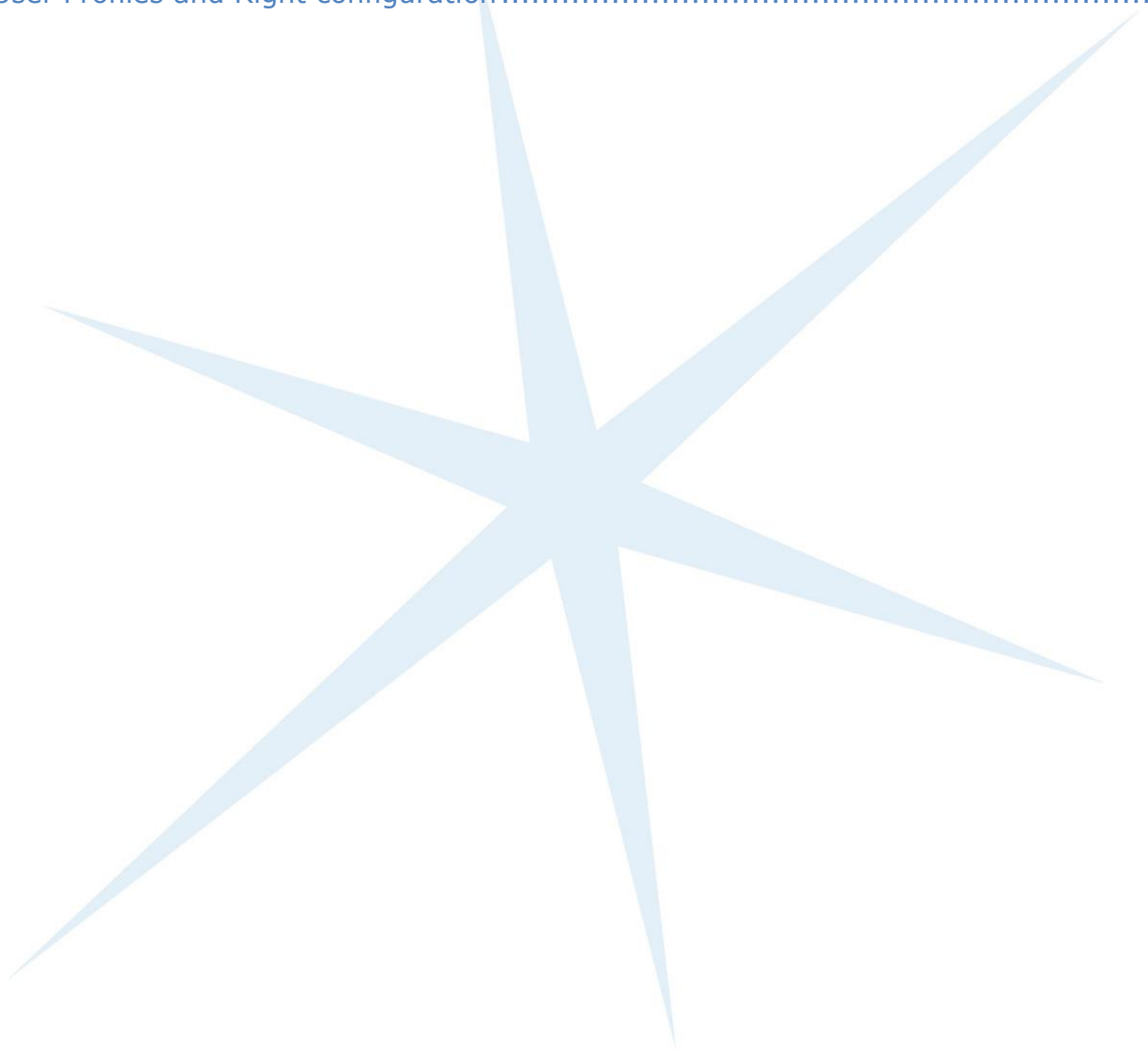
Introduction

This document outlines the workflow for the creation of new users within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

Objectives

To provide an overview of the processes involved in creating new users.

Conventions Used

Menu paths will be indicated throughout this training manual in bold.

For example:

Back Office | Product file | Stock Records

Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.
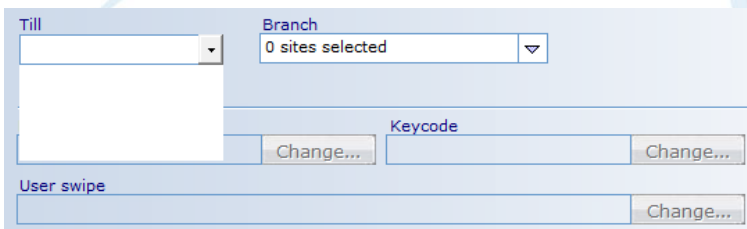
Users

Creating User Records

Users can be setup by going to the **Back Office | System Control | System Configuration | Users | User Records:**
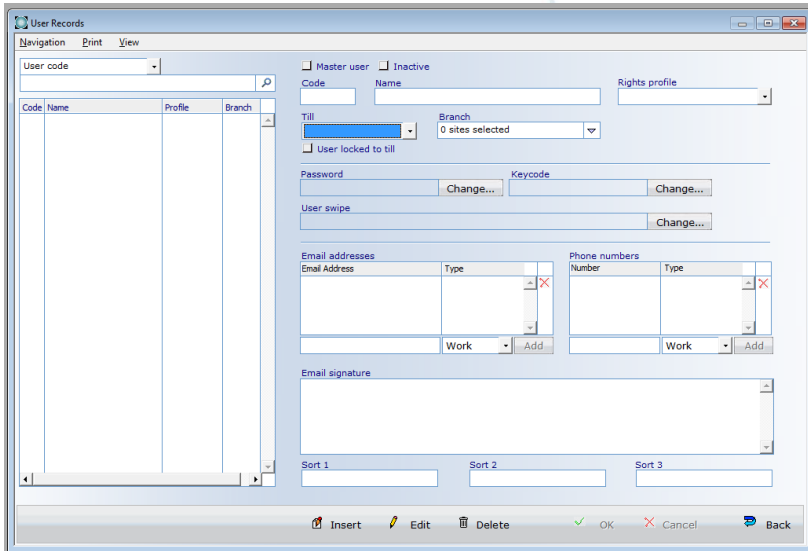
To create a new user, go to Insert, enter a code and a name for the user. Initially, all users could be selected as 'Master User' by ticking the check box next to it. This enables the user to override any restrictions that could be setup against them in the user profile. The user profiles can be set up in more detail at a subsequent time. For the moment, the rights profile can be kept blank.
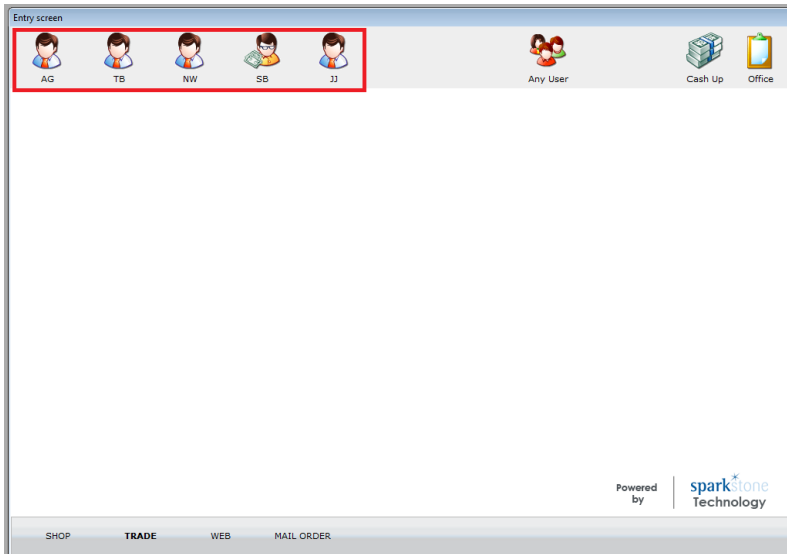
Users can be specified to a till or a site by selecting one from the list in each drop down:

It is also possible to specify a password and a user key code to use when they sign in to the front office. This can also be done at a later time.

Mapping Users in the Front screen

On the front splash screen it is possible for the users to show along the top:

To set these up, go to the **Back Office | System Control | User Key Mapping**:
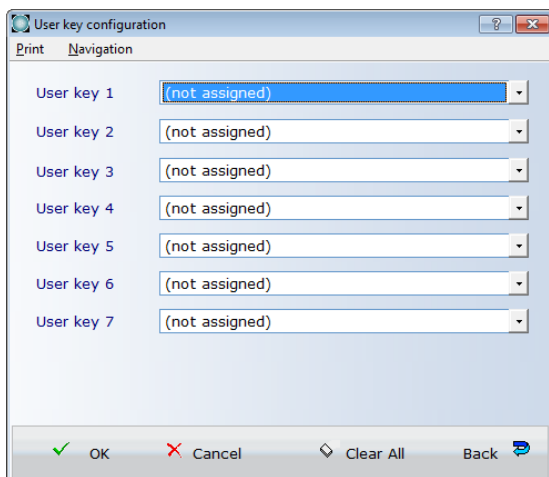
For each User Key use the drop down to select the user that you would like to position. When happy click 'OK'.

## User Profiles and Right configuration

It is likely that at the start all users have been created as Master users. User rights can be set up to restrict users from having access to certain things or to have limits set up.

Firstly, User profiles need to be created in order to distinguish between different groups of people that could have different levels of access. Go to the **Back Office | System Control | System Configuration | Users | User Profiles:**
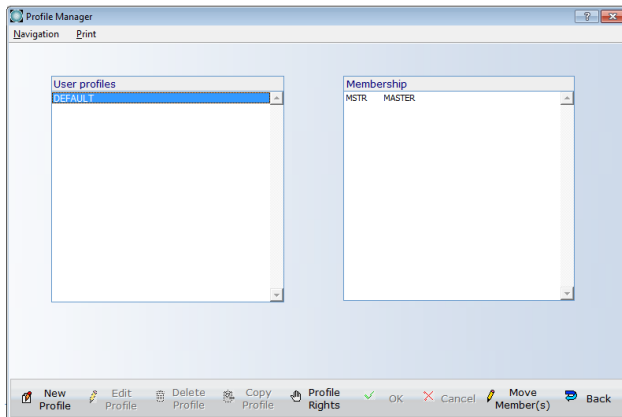

To start with everyone will be in the 'Default' group.

A new profile can be created by going to 'New Profile' then a name can be entered for the profile. Enter a name and press 'OK'. This will appear in the list under User Profiles:
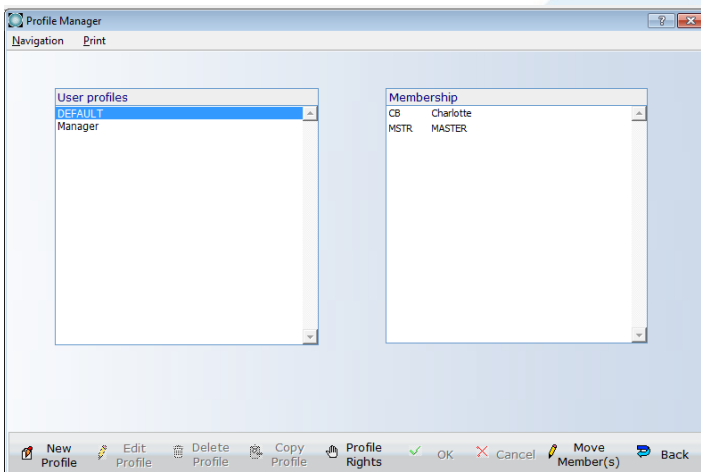
Currently the user 'Charlotte' is located under the default profile. This can be moved to the Manager profile by selecting the user, then going to Move member(s) and a pop up will appear:
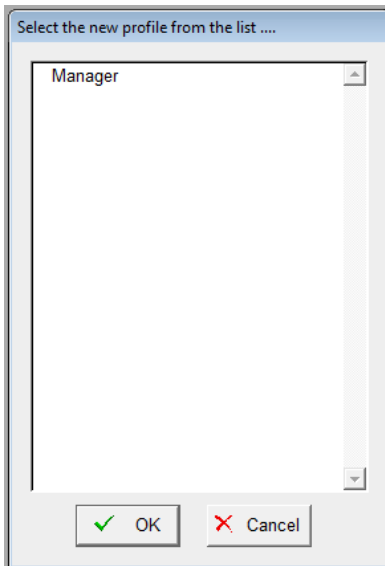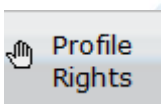
Select the profile name and click 'OK' the user will now be shown under the profile that it has been moved from:
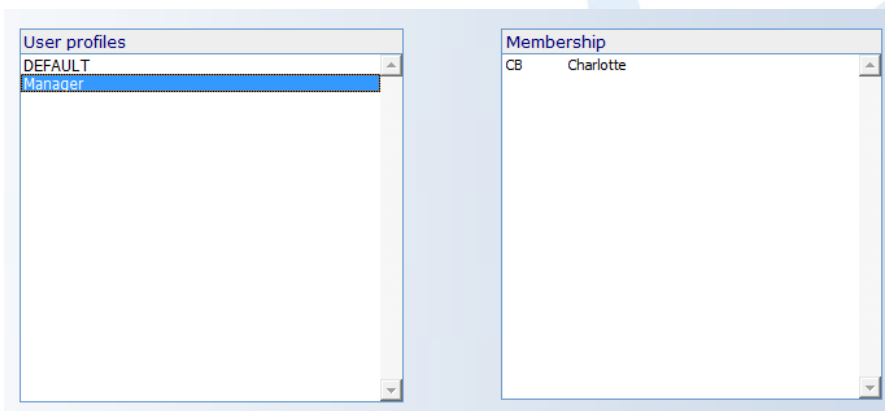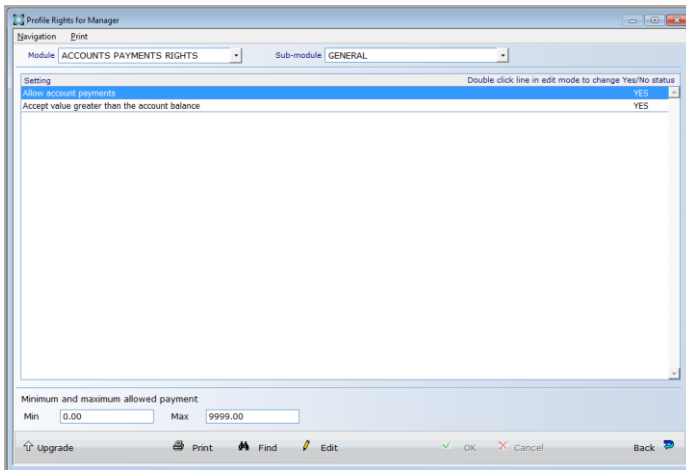

Once all of the profiles have been setup and the users are located in each one, the rights can be configured.

To do this, select the profile group on the left and select 'Profile Rights':


This will open the following window:

Each user right has a setting which can be configured from this screen.

The one selected 'Allow account payments' is currently set to yes with no min and max levels. The levels can be changed by going to 'Edit' and over typing the amounts in the boxes. If a setting needs to be disabled, this can be done by double clicking the highlighted line and the 'Yes' on the right hand side will change to 'No'.

In the drop downs at the top of the page, there are more Modules and sub-modules to select from:
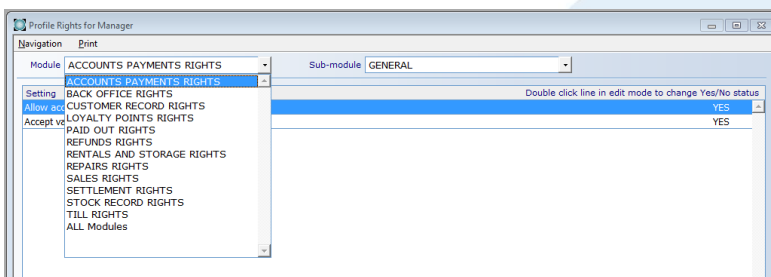
The 'All Modules' section at the bottom of the page can be selected and it is then possible to go down the list and see what is set up for each profile. Different profiles can have different profile rights based on what is setup here.

If you would like to find a specific user right, select 'Find' at the bottom of the page and enter what you are looking for in the search box and click 'OK'.

Users can be restricted from the Back Office for example by setting the user right 'Allow access to Back Office' to 'No.'