

iPOS - Manage Staff Access

Introduction

The iPOS system provides a number of levels of security. This document explains how to manage staff access to iPOS and how to add, change or remove staff from the system.

You will have seen by now that Active Staff appear as buttons on the POS screens. It is important that you maintain the buttons accurately so that staff do not use the incorrect buttons.

Procedure -Add A Staff Member

LOGIN to the system using your LOGIN and PASSWORD
Select Staff from the Administration Menu
Click the New Button (blank piece of paper icon, top right).

Fill in the fields

Login: The Login is what appears on the button, Use nicknames (no spaces) when staff have similar names

Name : The Full Name.

Active : Must be ticked.

Tick only Operator if this staff member is only going to use the POS system.
Tick Operator and Manager if this staff member is going to use a PIN number for promos.
Fill in the PIN Number and repeat it in the Confirm fields ONLY IF this person is allowed to have a PIN Number.

****PIN Numbers can be of any length, It is suggested that you have a minimum of 4.***

****PIN Numbers should be changed regularly.***

Fill in a Back Office Password only if this staff member is allow access to the Back Office reports. The Expires field is to be used as a reminder that passwords should be changed regularly.

Click the Save Button (top right corner, picture of a disk).
The system will now display your new entry in the list of Active Staff.

Procedure -Change A Staff Member

LOGIN to the system using your LOGIN and PASSWORD
Select Staff from the Administration Menu
Select the Staff Member from the List of Active Staff.
Change the fields as required
Click the Save Button (top right corner, picture of a disk).
The system will now display the changes in the list of Active Staff.

Procedure - To Remove A Staff Member

LOGIN to the system using your LOGIN and PASSWORD

Select Staff from the Administration Menu

Select the Staff Member from the List of Active Staff.

Remove the tick from the Active field.

Click the Save Button (top right corner, picture of a disk).

Staff that have taken orders in the POS system should never be deleted. The system needs their record to be kept in the database so that reports can be historically correct.

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Last update: **2025/07/14 14:48**

