

Creating and editing POS users

User profiles in PowerEPOS

ESTIMATED TIME 10 minutes

Every team member gets their own profile in PowerEPOS. That is what lets the system attribute each change and each transaction to a person, and it is what feeds the staff side of your reporting — who is selling what, who might need more training, and anything that looks off while it is still small.

Creating and editing POS users

<https://www.youtube.com/watch?v=NbnuyI5IFkU>

Before you start

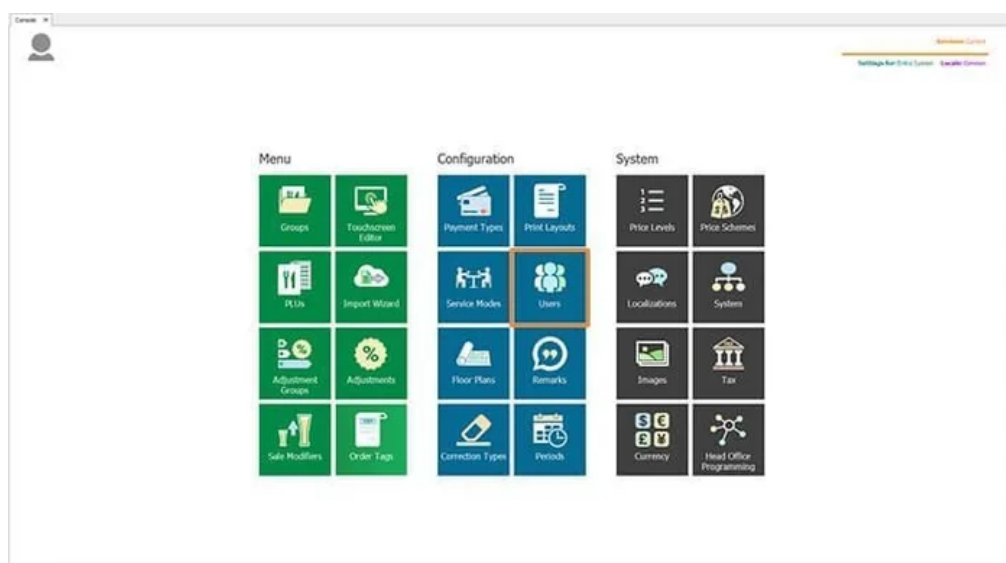
- Access to the PowerEPOS Management Console.
- The staff member's name, the outlet or region they work at, and the access role they should have.
- A PIN for them, of up to 8 digits.

Adding a new user

1

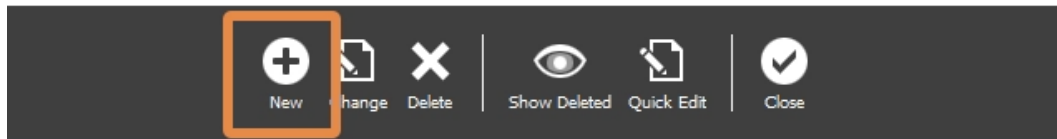
Open the Users module

In the PowerEPOS Management Console, select **Users**.



2 Start a new user

Select **New** from the centre Control Panel. The New User Configuration window opens.



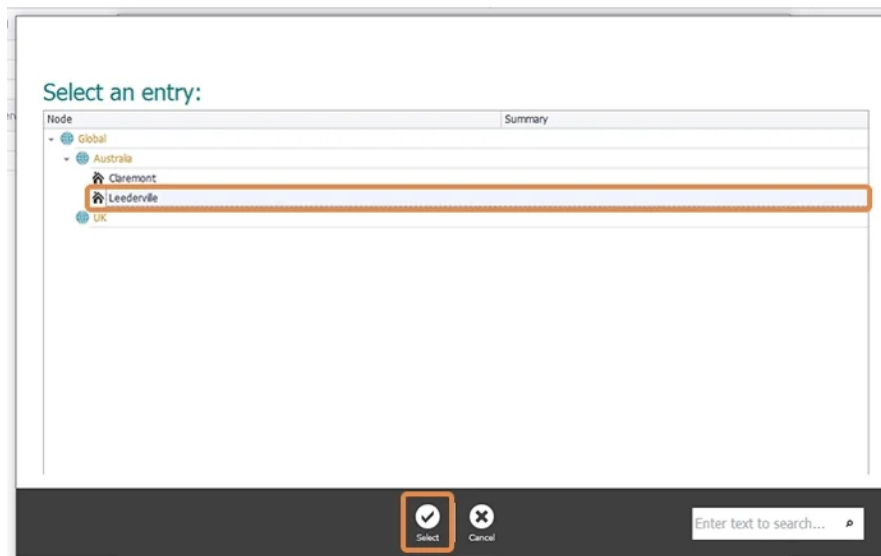
3 Name them and set their access role

Enter the user's name and pick their **Access Role** from the drop-down — in this example a new wait person, Joe Brown, gets *Wait Staff*. Then select the **Scope** search icon.

A window titled 'Joe Brown' with a 'Locale: Common' label in the top right. On the left is a sidebar with 'General' (selected) and 'Login'. The main area contains three fields: 'Name:' with a text box containing 'Joe Brown', 'Access Role:' with a dropdown menu showing 'Wait Staff' and a search icon, and 'Scope:' with a search icon and the text 'Global'. At the bottom right are three buttons: 'Managed by [Global]', 'Save', and 'Cancel'.

4 Set their scope

Scope is the regions and outlets the user is assigned to. Choose the ones they work at — here, Leederville — and select **Select** to save it.



Select an entry:

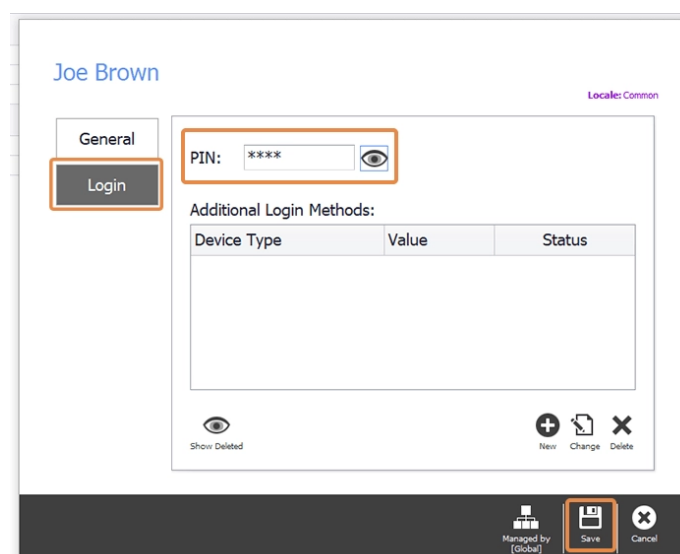
Node Summary

- Global
 - Australia
 - Claremont
 - Leederville
 - UK

Select Cancel Enter text to search...

5 Give them a PIN

Select **Login** to set the user's login method, and enter the PIN they will use on the POS terminal or device. A PIN can be up to 8 digits. Select **Save**.



Joe Brown

Locale: Common

General Login

PIN: ****

Additional Login Methods:

Device Type	Value	Status

Show Deleted New Change Delete

Managed by [Global] Save Cancel

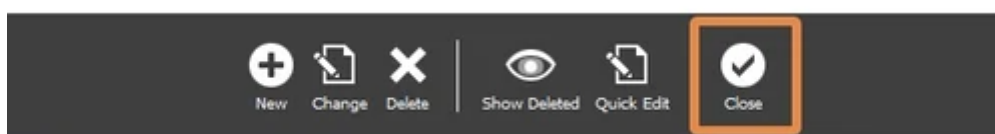
NOTE Other ways to sign in

Users can also be set up to sign in with an RFID card or fob. Contact Triniteq support if you want those turned on.

6

Close the module

Back in the Users module, select **Close**. That returns you to the Management Console, ready to publish.

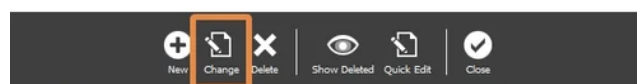
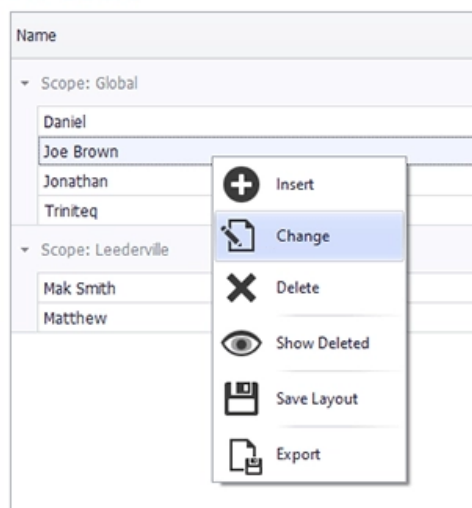


Editing a user

There are three ways to open the User Configuration window from the Users module. Any of them does the same thing.

- Double-click the user profile.
- Left-click the user profile and choose **Change** from the options.
- Select the profile, then **Change** in the Control Panel.

All Users



Publishing user settings to the POS

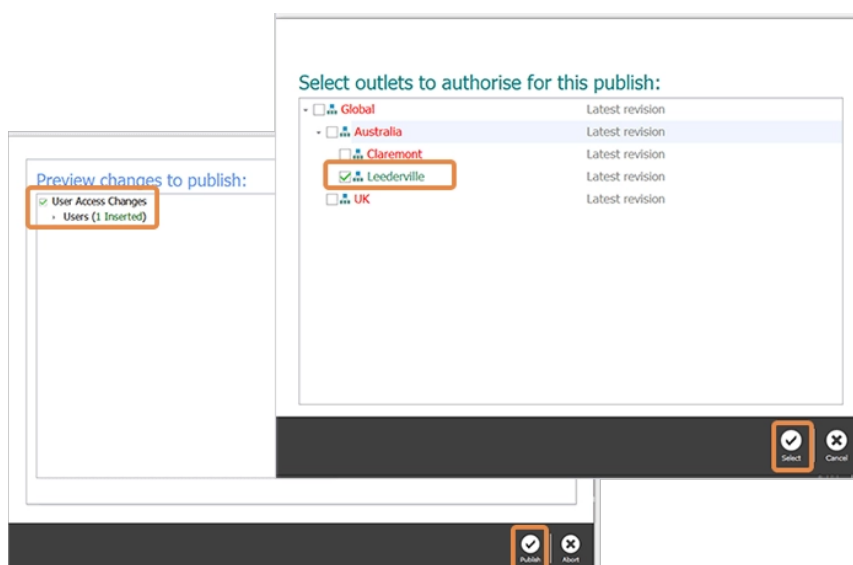
7 Open Publish

In the Management Console, the orange markers on the **Users** and **System** tiles show there are settings waiting to go out. Select **Publish** at the top right of the screen.



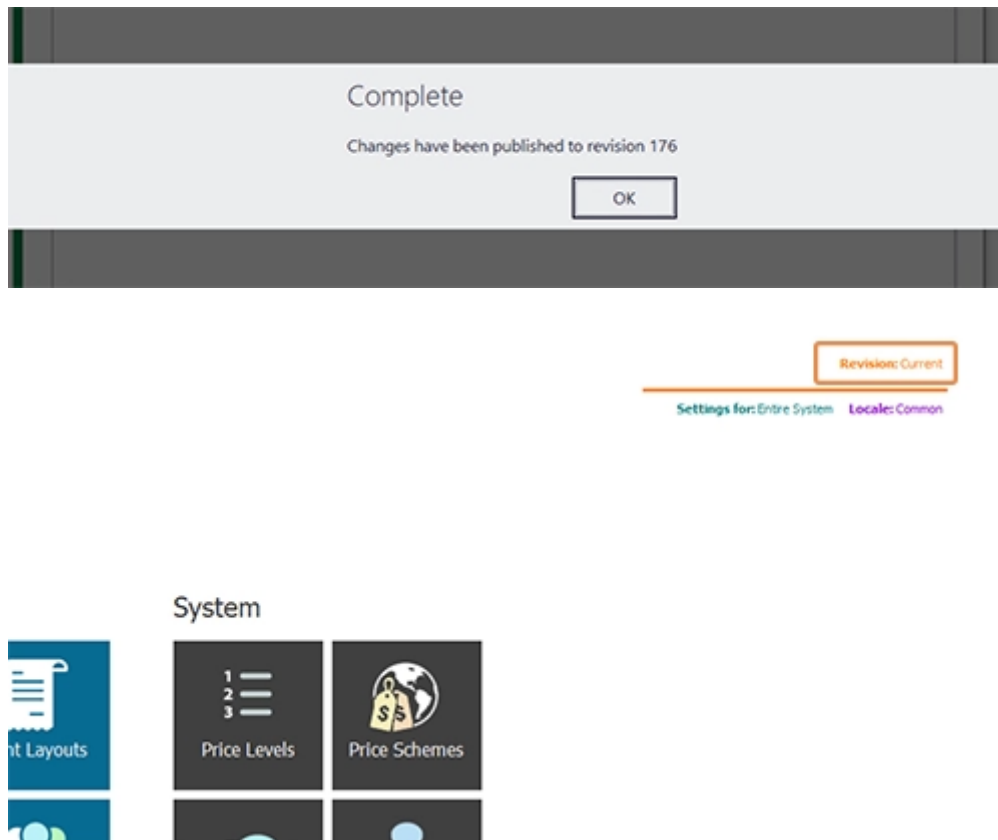
8 Choose the changes and the outlets

Check what is being published and where it is going, and clear anything you are not ready to send or any outlet you do not want it to reach.



9 Keep the revision number

When the publish finishes you get a **Complete** message with a revision number. That number is what the Revision Management Tool works from — it takes the place of the Publish button at the top right of the screen.



10 Need a hand? Contact Triniteq Support

NEED A HAND? CONTACT TRINITEQ SUPPORT

Phone **1300 784 276**

Email **support@triniteq.com**

Our support team is here to help.