



**Support Manual**

## iLabPOS - User Management

User Management, User access, Commissions and Sales Targets

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# Version 1.0

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## Table of Contents

Introduction.....	3
Accessing the User Management Screen.....	4
User Listing .....	4
User Search and Filtering.....	5
User Creation/deletion/modification .....	7
Creating a New User .....	7
Setting the Access Rights .....	8
<b>Enter a Password</b> .....	8
Deleting or deactivating a user .....	9
Modifying the user. ....	11
<b>Commissions by Category</b> .....	12

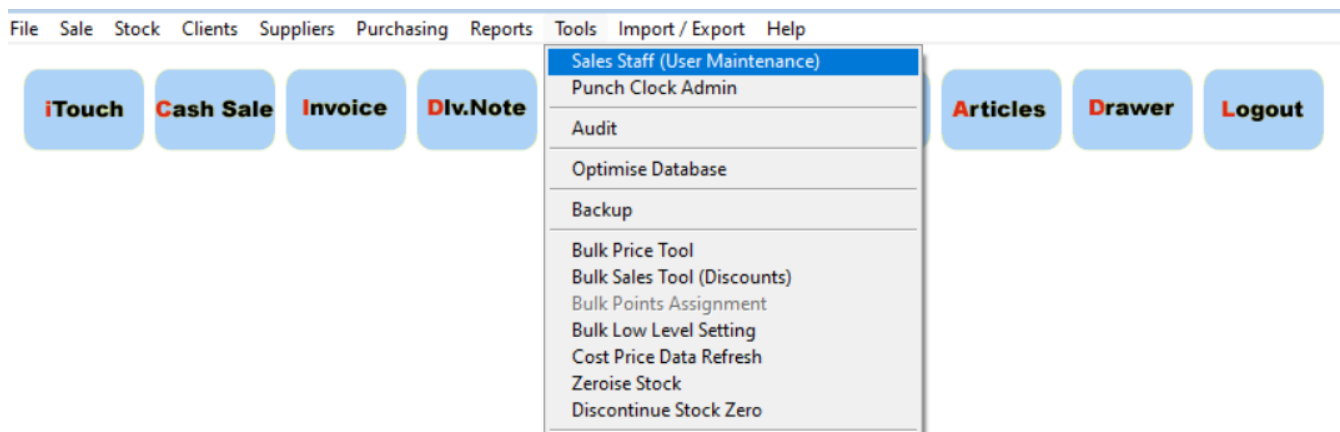
## Introduction

The User Management Screen in iLabPOS allows administrators to manage user accounts and access control settings. This user manual will guide you through the functionalities and features available in the User Management Screen, specifically focusing on adding/removing or modifying a user, granting access to different modules, commission by category, sales targets, and sales history.

## Accessing the User Management Screen

To access the User Management Screen in iLabPOS, follow these steps:

- 1 Log in iLabPOS using the credentials of an account that has administrative rights.
- 2 Navigate to the "Sales Staff (User Maintenance)" section under the Tools tab in the main menu.
- 3 Click on "Sales Staff (User Maintenance)" to enter the User Management Screen.



## User Listing

Upon accessing the Sales Staff (User Maintenance) Screen, you will find a list of all the users registered in iLabPOS. The list will typically display user details such as the user id, the salesperson name, the barcode number (employee number), the last time the user logged in, and the status of the account.



User: ADM

**SALES STAFF**

Terminal: Shop

User / Sales Person

User I.D.

Code / Barcode

Show inactive Accounts ☐

User I.D.	User / Sales Person	Code / Barcode	Last Logon	Active
ABR	ABRAHAM		25/05/2022	Yes
ADM	ADMINISTRATOR		08/06/2023	Yes
CHR	CHRIS		/ /	Yes
DAR	DARRYL	64752153554	28/09/2022	Yes
DUN	DUNSTAN		08/02/2022	Yes
PAU	PAUL		22/11/2022	Yes

Commission by Category

Sales Target

Print Label

Sales Today

0.00 €

Sales Last 30 days

0.00 €


XSellR8 User



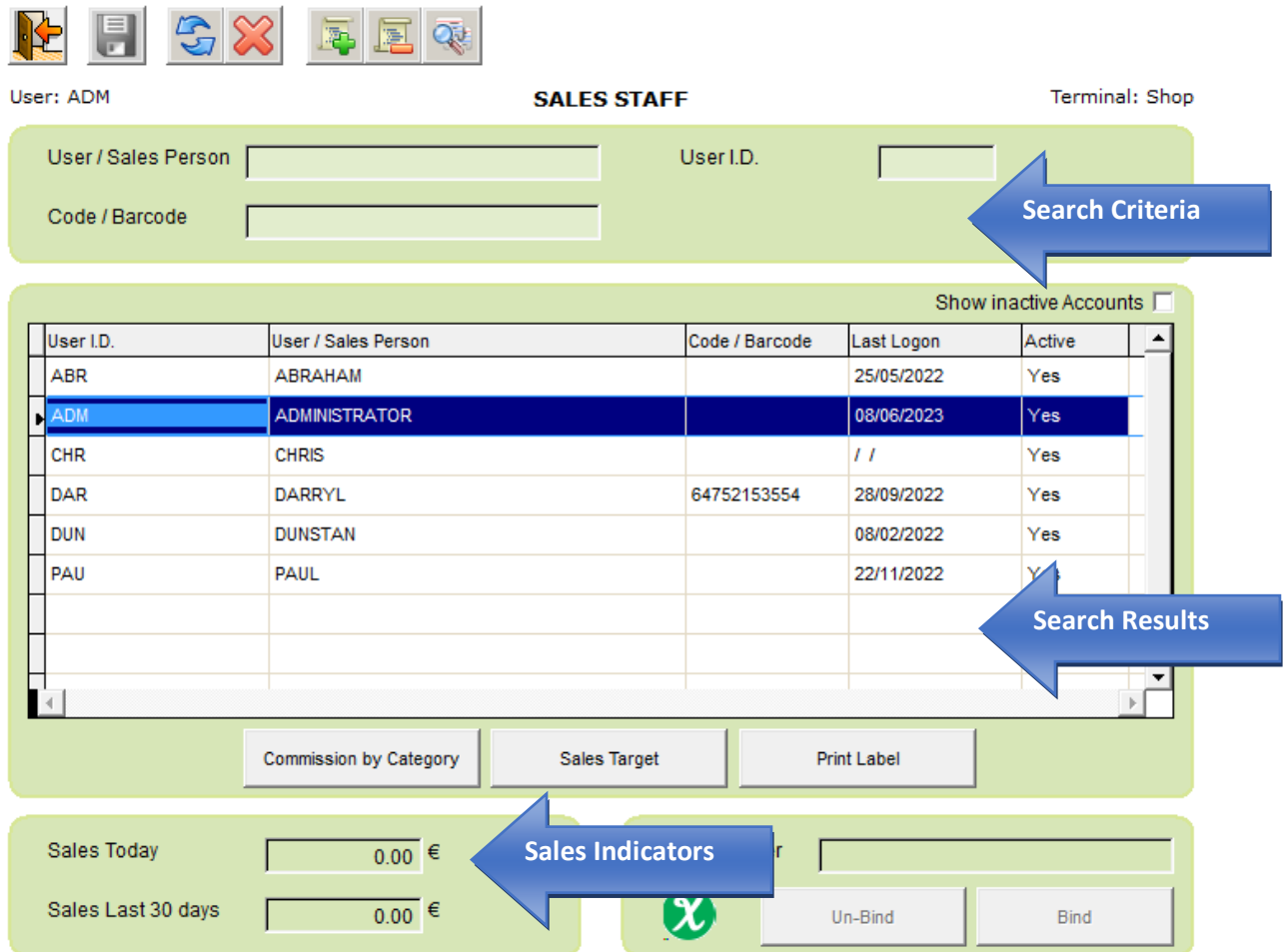
Un-Bind

Bind

## User Search and Filtering

To locate specific users quickly, iLabPOS offers search and filtering functionalities in the User Management Screen. You can search for a user by the name/surname, user ID or barcode/employee number. Press on the refresh button  to view the results. These options assist in narrowing down the user listing and finding the desired user efficiently.

Once the desired user is selected. There will be two visual indicators to track a user's sales performance, specifically focusing on sales done today and in the last 30 days. These indicators help monitor and assess a user's progress towards their sales targets.



The screenshot displays the iLabPOS SALES STAFF interface. At the top, there is a toolbar with icons for navigation and actions. Below the toolbar, the status bar shows "User: ADM", "SALES STAFF", and "Terminal: Shop".

The main section is divided into three parts:

- Search Criteria:** A green box containing input fields for "User / Sales Person", "User I.D.", and "Code / Barcode". A blue arrow labeled "Search Criteria" points to this section.
- Search Results:** A table listing users with columns for User I.D., User / Sales Person, Code / Barcode, Last Logon, and Active. The "ADM" user is highlighted. A blue arrow labeled "Search Results" points to the table.
- Sales Indicators:** A green box at the bottom showing "Sales Today" and "Sales Last 30 days" with values of 0.00 €. A blue arrow labeled "Sales Indicators" points to this section.

Below the search results table, there are buttons for "Commission by Category", "Sales Target", and "Print Label". At the bottom right, there are buttons for "Un-Bind" and "Bind".

User I.D.	User / Sales Person	Code / Barcode	Last Logon	Active
ABR	ABRAHAM		25/05/2022	Yes
ADM	ADMINISTRATOR		08/06/2023	Yes
CHR	CHRIS		/ /	Yes
DAR	DARRYL	64752153554	28/09/2022	Yes
DUN	DUNSTAN		08/02/2022	Yes
PAU	PAUL		22/11/2022	Y

Sales Today: 0.00 €


Sales Last 30 days: 0.00 €

Buttons: Commission by Category, Sales Target, Print Label, Un-Bind, Bind.

## User Creation/deletion/modification

### Creating a New User

To create a new user in iLabPOS through the User Management Screen, follow these steps:

1. Access the sales staff (user Maintenance) screen.
2. Locate the "Add " button : located at the top of the User Management Screen. This button allows you to initiate the user creation process.
3. Complete the required user details, which include the following information:
  - **User ID** is a unique identifier for each user, consisting of either a unique 3-digit number, 3 characters, or a combination of both. For example, if you have a salesperson named Matthew, you could use "MAT" as the User ID. In case you have two salespersons with similar names, such as Matthew Borg and Matthew Attard, you can create a letter combination from their name and surname, like "MAB" and "MAA." Alternatively, you could use "MA1" and "MA2" as the User IDs. This system allows for easy identification of users within the system.
  - **Name** and **surname** of the employee
  - **Barcode number /employee number (not compulsory)** this is used in case you have multiple users, and they need to switch between users by scanning a barcode.
  - **Discount percentage** the maximum discount that a user can give.
  - **Commission:** This is the standard percentage of commission (if any) that a salesperson will get when he sells products.

When everything is set proceed to the access rights section.



User: RAY      **SALES STAFF - DETAIL**      Terminal: Mosta

User I.D.	<input type="text"/>	Last Logon	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	Maximum Discount	<input type="text" value="0"/> %	No Access Required <input type="checkbox"/> 
Barcode No.	<input type="text"/>	Commission	<input type="text" value="0"/> %	User Account Active <input checked="" type="checkbox"/>

## Setting the Access Rights

To determine which access to grant, you can select or deselect the appropriate checkboxes based on the user's requirements. Hovering over each checkbox will display a description of the corresponding function. The user rights are categorized into four groups as follows:

**Group 1:** Sales-related functions (e.g., Salesperson, cashier)

**Group 2:** Screens for stock management and pricing functionality (e.g., storekeeper)

**Group 3:** Screens for generating reports (e.g., Accounts)

**Group 4:** Administrator functions (e.g., IT administrator)

Access Rights - Scroll on each item with the mouse to see which screens are affected

Group 1 - Sales Related	Group 2 - Stock and Pricing	Group 3 - Reports	Group 4 - Administrator
<input checked="" type="checkbox"/> Sales	<input checked="" type="checkbox"/> Article Management	<input checked="" type="checkbox"/> Sales Reports - Batch 1	<input checked="" type="checkbox"/> System Preferences
<input checked="" type="checkbox"/> Re-prints	<input checked="" type="checkbox"/> View/Change Cost Price	<input checked="" type="checkbox"/> Sales Reports - Batch 2	<input checked="" type="checkbox"/> User Maintenance
<input checked="" type="checkbox"/> Article QuickView	<input checked="" type="checkbox"/> Articles - Only Barcode Print	<input checked="" type="checkbox"/> Sales Reports - Batch 3	<input checked="" type="checkbox"/> Audit
<input checked="" type="checkbox"/> Clients	<input checked="" type="checkbox"/> Stock Transfer In	<input checked="" type="checkbox"/> Profit Report	<input checked="" type="checkbox"/> Import & Export Data
<input checked="" type="checkbox"/> Credit Control	<input checked="" type="checkbox"/> Stock Transfer Out	<input checked="" type="checkbox"/> VAT Summary	<input checked="" type="checkbox"/> Backups
<input checked="" type="checkbox"/> Accept Payments	<input checked="" type="checkbox"/> Transfer in From Shop	<input checked="" type="checkbox"/> Stock Reports	<input checked="" type="checkbox"/> Stock Transfers Admin

*Note: A tooltip is visible over the 'View/Change Cost Price' checkbox, listing: Cash Sale, Cash Sale iTouch, Invoice, Open Cash Drawer, Invoice Management*

**Please note that you can press the tick all button to tick all the boxes at once, or the tick none button to untick all the boxes.**


## Enter a Password

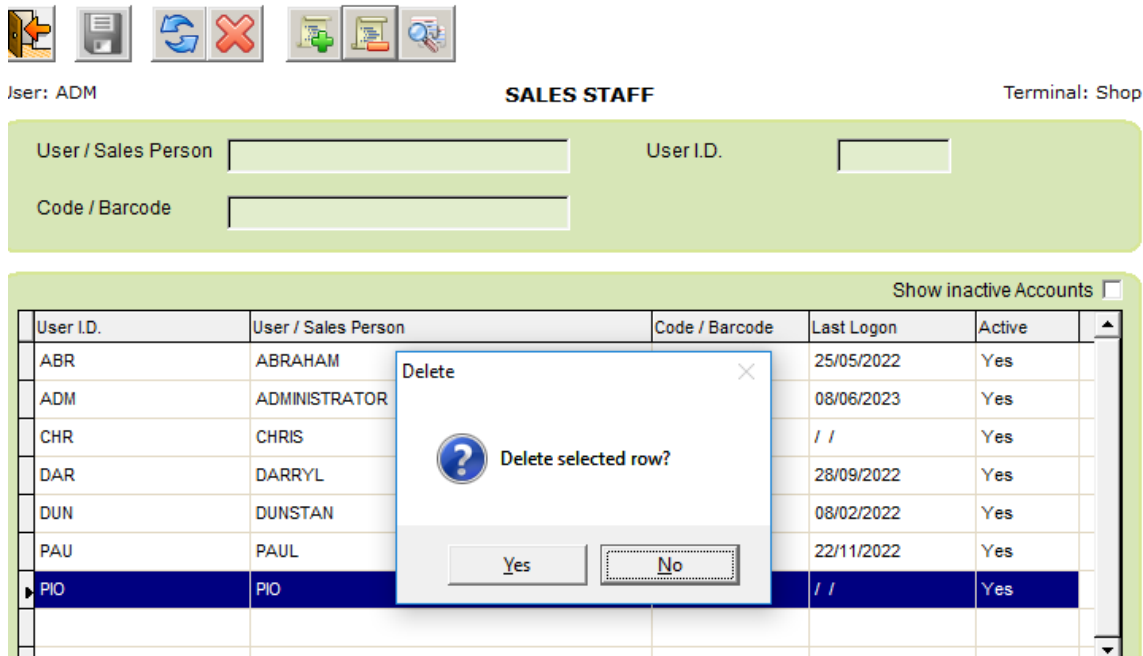
Finally, you will be required to enter a unique five-digit number password in the designated field at the bottom of the screen. Repeat the password and once entered, click the "SAVE" button to save the new user.

The screenshot shows a settings interface with a light green background. At the top, there are several checkboxes arranged in two columns. The first column contains four checked checkboxes: 'Allow Negative Sales', 'Open Drawer W/O Reason', 'Daily Sales (Z Readings)', and 'Daily Sales on All Terminals'. The second column contains three unchecked checkboxes: 'Manual Stock Adjustments', 'Client Reports', and 'Expenses Report'. Below these checkboxes are two buttons: 'Tick All' and 'Tick None'. At the bottom of the screen, there are two password fields. The first is labeled 'Password' and has a text input field with five asterisks, followed by the instruction '(Choose a 5 digit number)'. The second is labeled 'Re-Enter Password' and also has a text input field with five asterisks.

## Deleting or deactivating a user

Please be aware that a user can only be deleted if they have not performed any transactions. To delete a user, follow these steps:

1. Navigate to the Sales staff screen.
2. Locate the user you wish to delete and press on it to highlight it
3. Click on the "Subtract" button  associated with the user.
4. A confirmation prompt 'Delete Selected Row' will appear. Press "Yes" to confirm the deletion.




The screenshot shows the iLabPOS interface. At the top, there is a toolbar with icons for navigation and actions. Below the toolbar, the user is logged in as 'ADM' and the terminal is 'Shop'. The main section is titled 'SALES STAFF'. It contains input fields for 'User / Sales Person', 'User I.D.', and 'Code / Barcode'. Below these is a table of users. A 'Delete' dialog box is open, asking 'Delete selected row?' with 'Yes' and 'No' buttons. The table has columns: User I.D., User / Sales Person, Code / Barcode, Last Logon, and Active. The row for 'PIO' is selected.

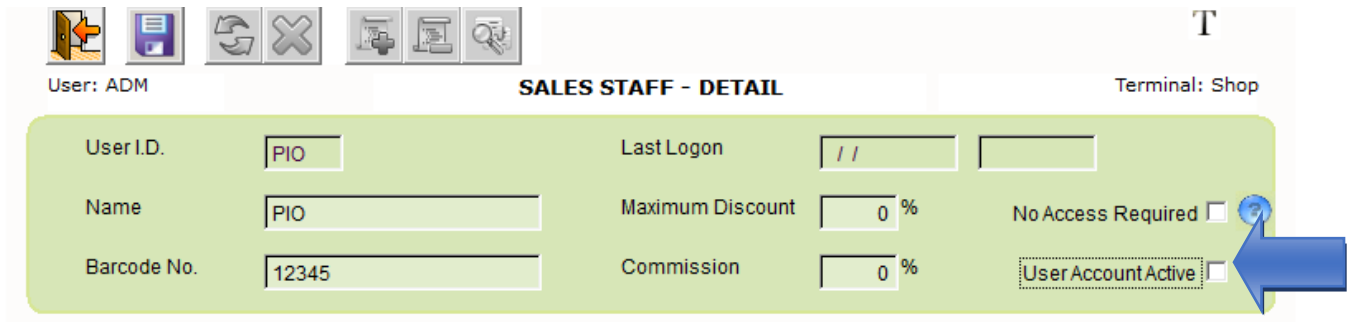
User I.D.	User / Sales Person	Code / Barcode	Last Logon	Active
ABR	ABRAHAM		25/05/2022	Yes
ADM	ADMINISTRATOR		08/06/2023	Yes
CHR	CHRIS		/ /	Yes
DAR	DARRYL		28/09/2022	Yes
DUN	DUNSTAN		08/02/2022	Yes
PAU	PAUL		22/11/2022	Yes
PIO	PIO		/ /	Yes

Please note that this action can only be performed when there are no recorded transactions associated with the user.

If a user is no longer employed by the business, you can deactivate their account using the following steps:

1. Select the user you want to deactivate.
2. Click on the magnifying glass icon .
3. In the bottom right corner of the upper part of the screen, locate the user Account Active tick box.
4. Untick the tick box to deactivate the user's account.

By following these steps, you can successfully deactivate a user who is no longer working with the business.




The screenshot shows the 'SALES STAFF - DETAIL' window. At the top, there are icons for navigation and a 'T' icon. Below the icons, it says 'User: ADM' and 'Terminal: Shop'. The main area is a green box containing the following fields:

User I.D.	PIO	Last Logon	//	
Name	PIO	Maximum Discount	0 %	No Access Required <input type="checkbox"/>
Barcode No.	12345	Commission	0 %	User Account Active <input type="checkbox"/>

A blue arrow points to the 'User Account Active' checkbox.

## Modifying the user.

If you need to make modifications to a user's details or accessibility to screens, you can follow these steps:

1. Locate the user you want to modify.
2. Click on the magnifying glass icon  associated with the user.
3. This will open a screen where you can make changes to the user's details and/or adjust their accessibility to screens as needed.
4. Once you have made the necessary modifications, click the "SAVE" button to save the changes.

By following these steps, you can easily modify a user's details and screen accessibility and ensure that the changes are saved appropriately.

## Commissions by Category

In iLabPOS, the User Management Screen offers administrators the ability to assign commission rates to users based on various categories. To configure or update commission rates for a user, follow these steps:

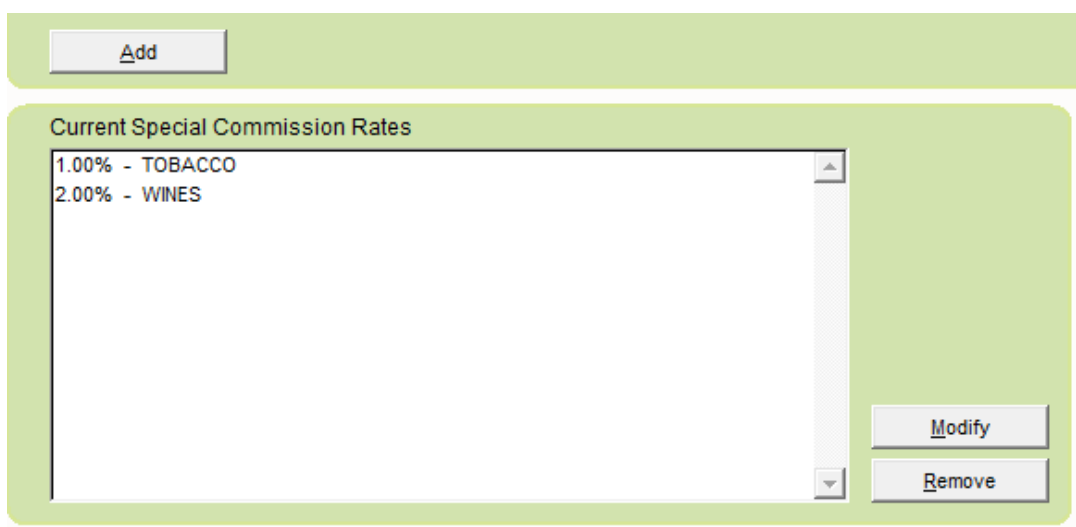
1. Highlight the user's account in the User Management Screen.
2. Click the "Commission by Category" button.
3. A new window will appear, allowing you to specify the category and its associated commission percentage.
4. Press the "Add" button to include the category and commission combination.
5. You can add multiple categories and commissions as desired.



Once added, the categories and their respective commissions will be displayed. To make modifications, follow these steps:

1. Select the desired category.
2. Click the "Modify" button.
3. Adjust the commission percentage as needed.
4. Press the "Save" button to save the changes.

If you wish to delete a specific commission for a category, use the "Remove" button.



The screenshot shows a software interface for managing commission rates. At the top, there is a green bar with a button labeled 'Add'. Below this bar is a section titled 'Current Special Commission Rates'. Inside this section is a list box containing two entries: '1.00% - TOBACCO' and '2.00% - WINES'. To the right of the list box, there are two buttons: 'Modify' and 'Remove'.

Commission Rate	Category
1.00%	TOBACCO
2.00%	WINES

Once you are satisfied with the commission rates for the different categories, click the "Save" button to finalize and save the changes.