Support Manual

iLabPOS - User Management

User Management, User access, Commissions and Sales Targets

Version 1.0

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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.

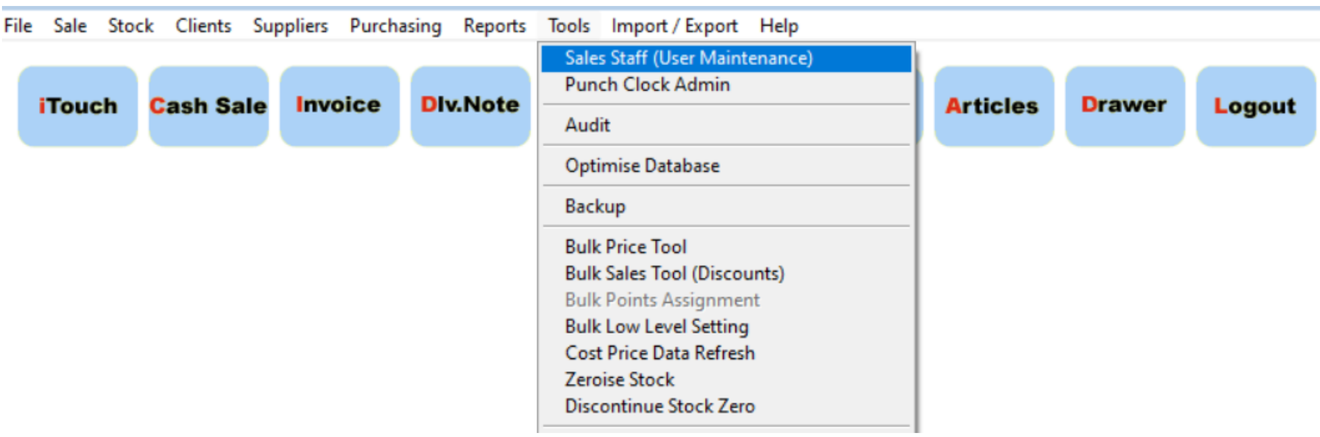
Accessing the User Management Screen

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.

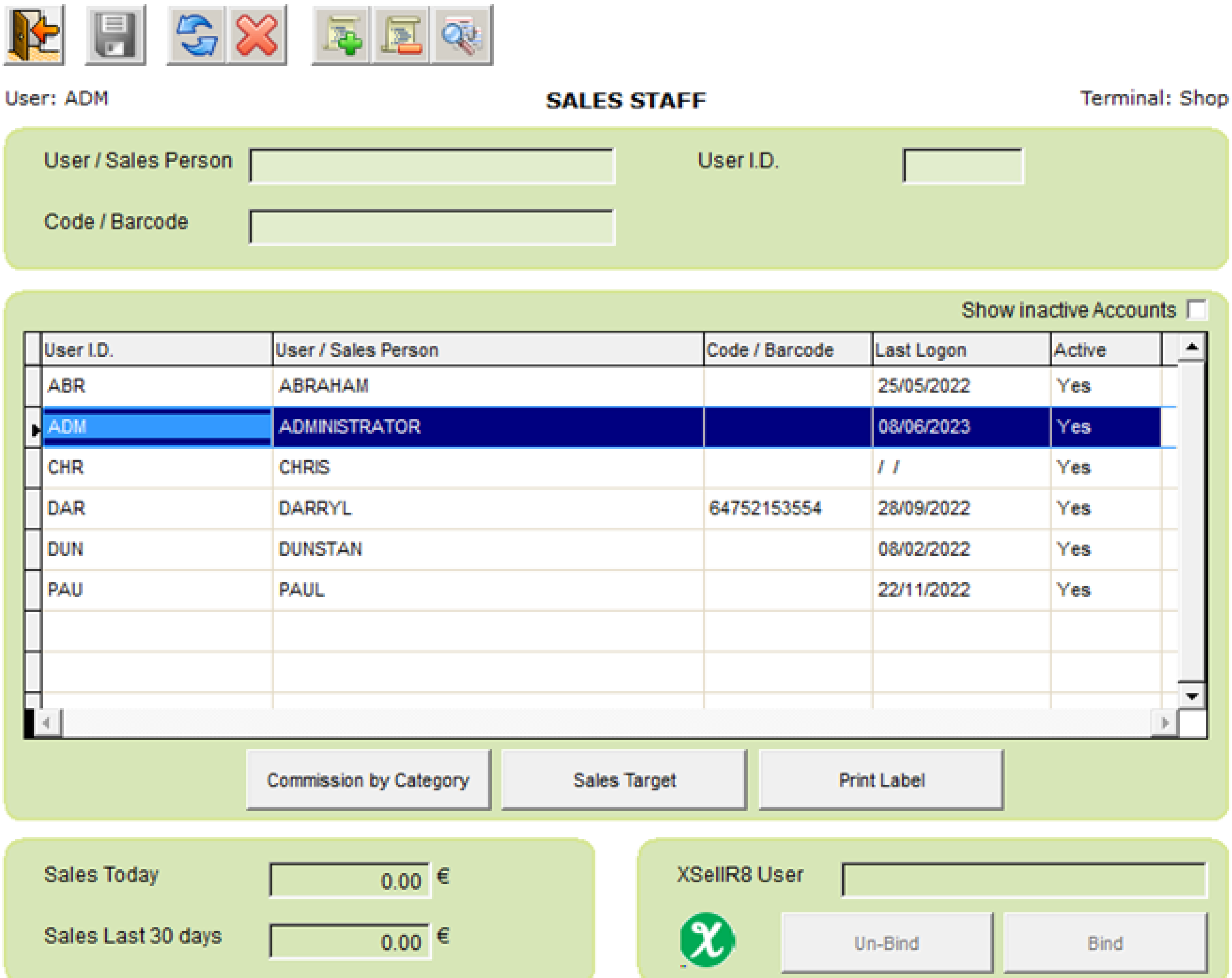
2 Navigate to the "Sales Staff (User Maintenance)" section under the Tools tab in the main menu.

3 Click on "Sales Staff (User Maintenance)" to enter the User Management Screen.



User Listing

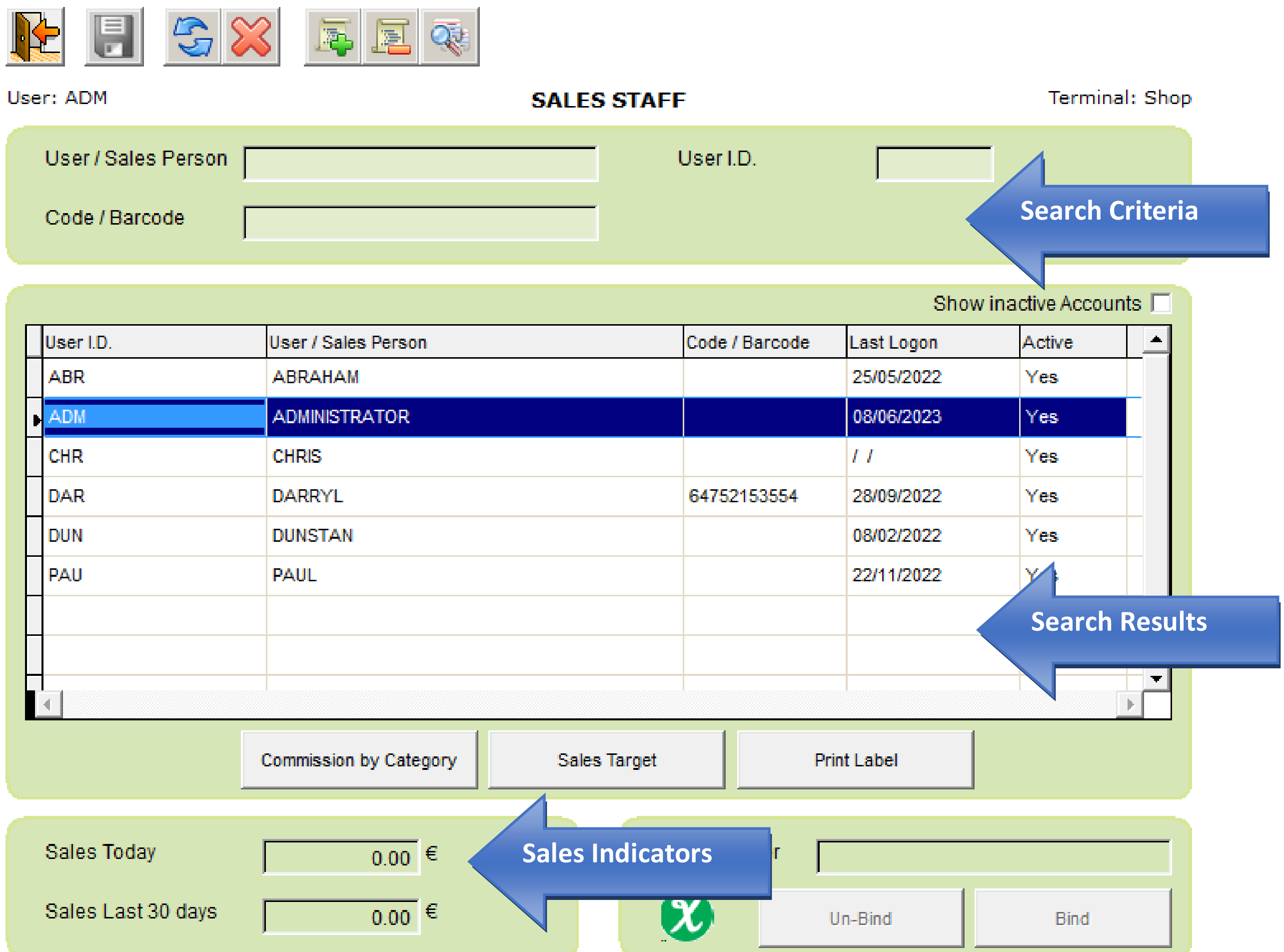
Upon accessing the Sales Staff (User Maintenance) Screen, you will find a list of all the users registered in iLabPOS. The list will typically display user details such as the user id, the salesperson name, the barcode number (employee number), the last time the user logged in, and the status of the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



User 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.



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.

Setting the Access Rights

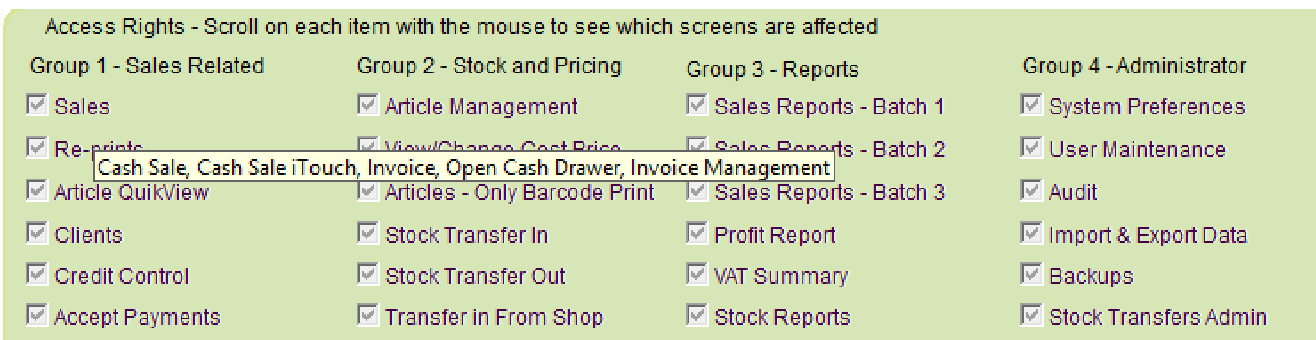
To determine which access to grant, you can select or deselect the appropriate checkboxes based on the user's requirements. Hovering over each checkbox will display a description of the corresponding function. The user rights are categorized into four groups as follows:

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)



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.

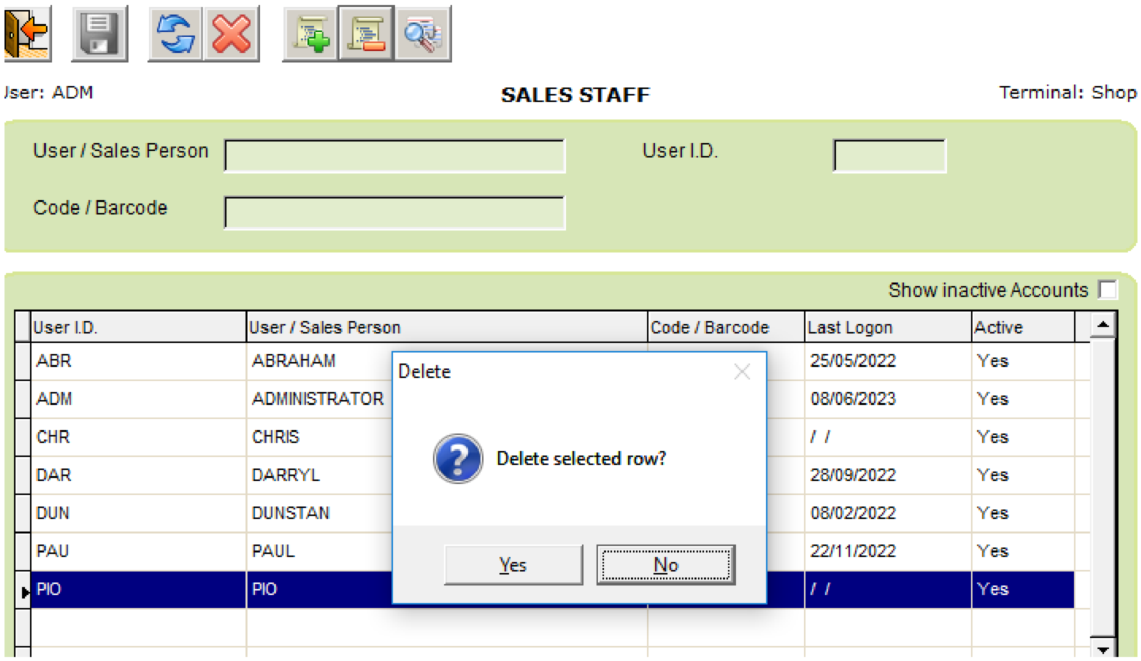
Enter a Password

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.

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.

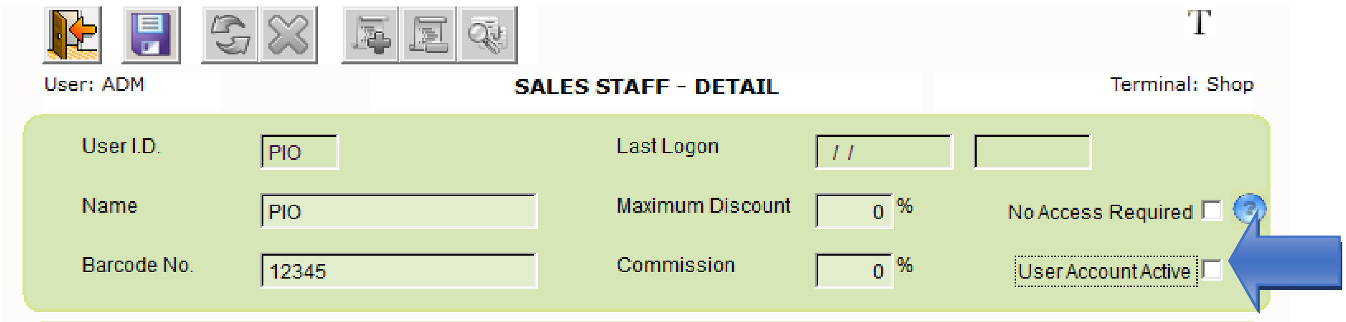


Please note that this action can only be performed when there are no recorded transactions associated with the user.

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.



Modifying the user.

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

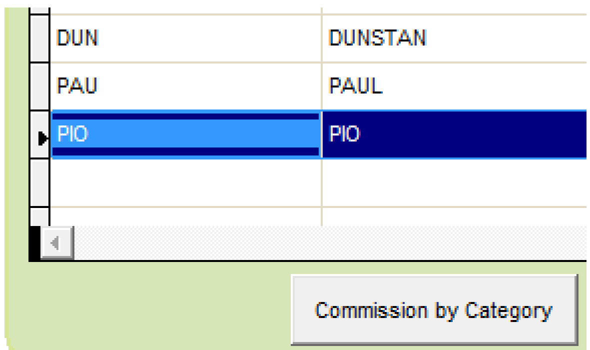
1. Locate the user you want to modify.
2. Click on the magnifying glass icon  associated with the user.
3. This will open a screen where you can make changes to the user's details and/or adjust their accessibility to screens as needed.
4. Once you have made the necessary modifications, click the "SAVE"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

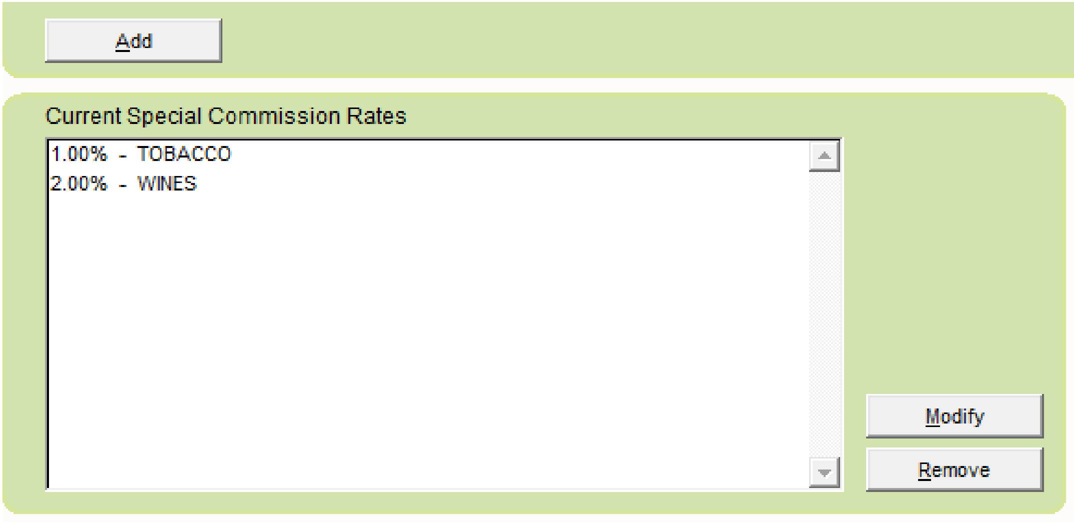
1. Highlight the user's account in the User Management Screen.
2. Click the "Commission by Category" button.
3. A new window will appear, allowing you to specify the category and its associated commission percentage.
4. Press the "Add" button to include the category and commission combination.
5. You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



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