



Understanding and Managing Employee Permissions for Your POS

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WHAT YOU'LL LEARN

Employee Permissions

- Advantages of employee permissions
- Why it's important to set employee permissions
- Tracking and managing permissions
- How to set up permissions in Paladin
- Other Paladin access permissions

Advantages of employee permissions



- Tracks accountability for employees' actions.
- Allows employees to perform tasks specific to their job.
- Prevents employees from accessing information not relevant to their role.
 - Point-of-sale
 - Customer management – accounting
 - Purchasing – ordering/receiving
 - Inventory
 - Reporting and other back-office functions
 - Changing administrative settings

Why it's important to set employee permissions



- Employee permission levels allow you to:
- Define user roles
 - Cashier
 - Office support
 - Administrator/contractor
 - Manager
 - Owner/partner
- Control what they can see, do and change in the point of sale (POS)
 - Cashiers – perform sales, refunds, product lookup
 - Managers – approve discounts, set transaction levels, change pricing, inventory levels, and employee data

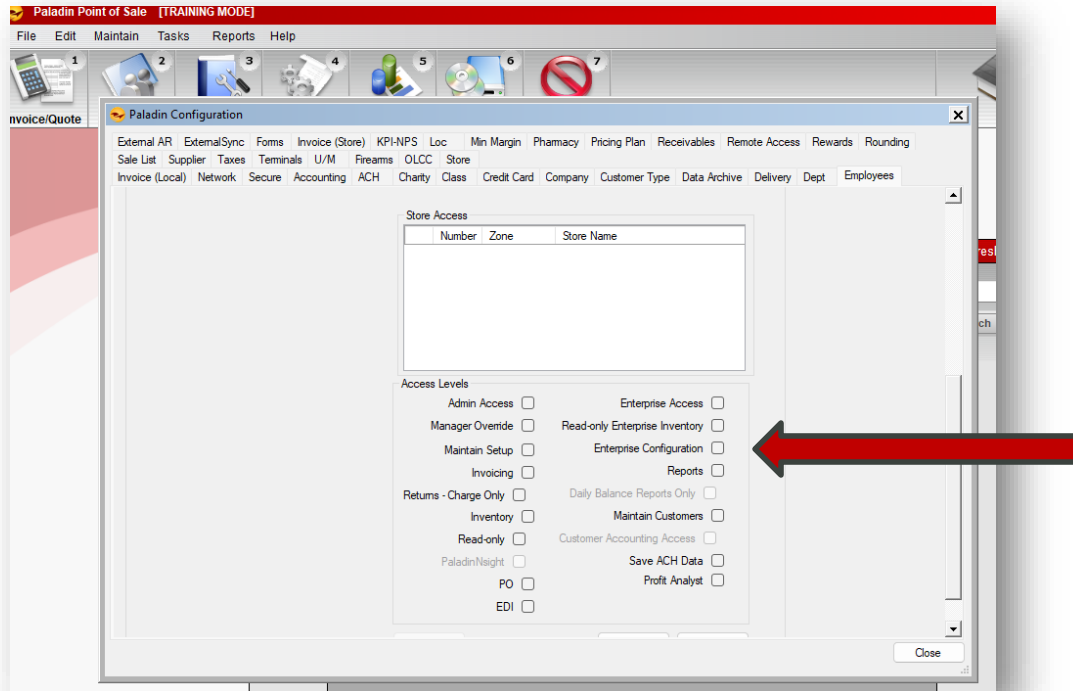
Tracking and managing permissions



Monitor user activities

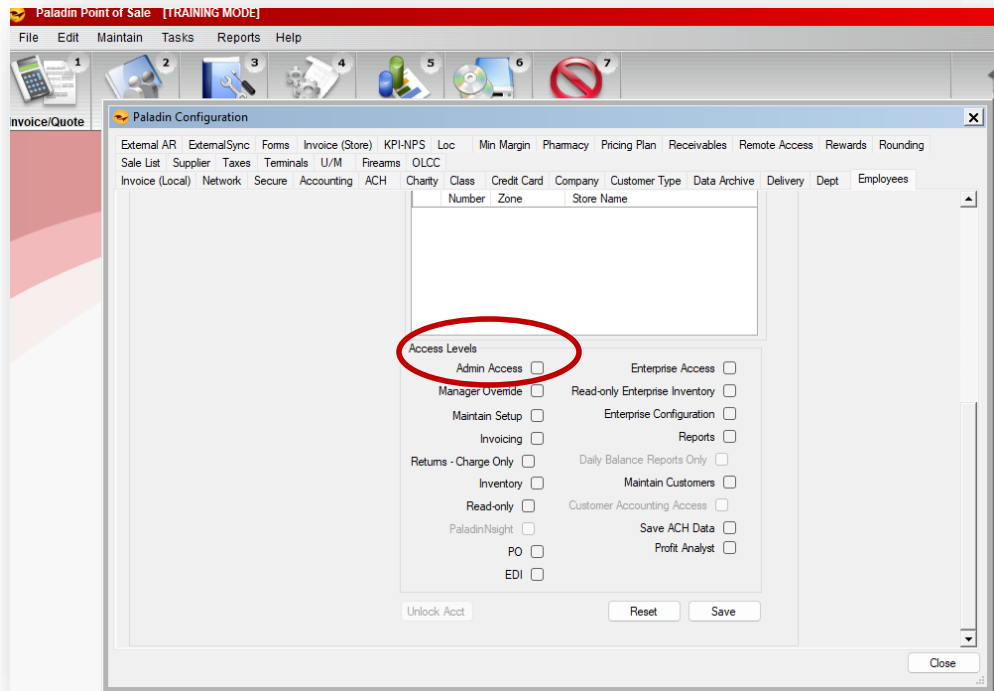
- Where and when employees are logged in.
- Failed login attempts.
- What transactions are made by which employees.
- Track margins and profits by salesperson.
- Salesperson discounting exception reports.
- Unauthorized access and use.
- Voided and fraudulent transactions.
- Track returns and limit return amounts.
- Identify areas where additional training is needed.

How to setup employee permissions in Paladin



- From the main menu, select **File > Setup**.
- Select the **Employees** tab.
- In the **Employees** list field, select the employee from the list or click **New** to add an employee.
- In the **Store Access** pane, select the checkboxes for the permissions that you want to apply for this employee.
- Click **Save**, then click **Close**.

Administrator Access



Admin Access

- Paladin Configuration settings (tabs): **Credit Card, Employees, Network and Taxes.**
- Log data in **Data Viewer.**
- Change the date in Paladin.
- Merge customers and inventory items.
- Designate items as non-inventory items.
- Void customer transactions in the Customer Friendly Sales History viewer.
- Make changes to email settings.

Manager Override

Access Levels

Admin Access <input checked="" type="checkbox"/>	Enterprise Access <input type="checkbox"/>
Manager Override <input checked="" type="checkbox"/>	Read-only Enterprise Inventory <input type="checkbox"/>
Maintain Setup <input checked="" type="checkbox"/>	Enterprise Configuration <input type="checkbox"/>
Invoicing <input checked="" type="checkbox"/>	Reports <input checked="" type="checkbox"/>
Returns - Charge Only <input type="checkbox"/>	Daily Balance Reports Only <input type="checkbox"/>
Inventory <input checked="" type="checkbox"/>	Maintain Customers <input checked="" type="checkbox"/>
Read-only <input type="checkbox"/>	Customer Accounting Access <input checked="" type="checkbox"/>
PaladinN Sight <input checked="" type="checkbox"/>	Save ACH Data <input type="checkbox"/>
PO <input checked="" type="checkbox"/>	Profit Analyst <input checked="" type="checkbox"/>
EDI <input checked="" type="checkbox"/>	

Manager override

- Enter a password to approve returns, process transactions with the cash drawer open, apply specified discounts at checkout, process cash drops, and transact a check amount that is over \$100.00.

Maintain Setup

- Access the **Paladin Configuration (File > Setup)**.

Invoicing

- Access the **Inventory/Quote** module.

Inventory

- Access the Inventory module. **Read-Only** under **Inventory** module allows access but prevents adjustments.

PaladinNsight, EDI, PO's Multistore Access

Access Levels

Admin Access <input checked="" type="checkbox"/>	Enterprise Access <input type="checkbox"/>
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<u>PO</u> <input checked="" type="checkbox"/>	Profit Analyst <input checked="" type="checkbox"/>
<u>EDI</u> <input checked="" type="checkbox"/>	

PaladinNsight

- Access the PaladinNsight dashboard.

PO

- Access the **Purchase Order** module.

EDI

- Access **EDI** functions. EDI access must be enabled by Paladin Support, following EDI training session.

Enterprise Access

- Access all inventory management functions for all stores except Paladin Configuration for Multi-store.
- Read Only Enterprise allows **Inventory** access but prevents adjustments.

PaladinNaight

Access Levels

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Manager Override <input checked="" type="checkbox"/>	Read-only Enterprise Inventory <input type="checkbox"/>
Maintain Setup <input checked="" type="checkbox"/>	Enterprise Configuration <input type="checkbox"/>
Invoicing <input checked="" type="checkbox"/>	Reports <input checked="" type="checkbox"/>
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PO <input checked="" type="checkbox"/>	Profit Analyst <input checked="" type="checkbox"/>
EDI <input checked="" type="checkbox"/>	

PaladinNaight

- To access the PaladinNaight dashboard, the “Disable Inventory Dashboards” must be unchecked under File->Setup->Company tab, Inventory section, otherwise it is not available in the employee permissions tab.

Inventory

Forecast Demand Active Weeks Threshold %	<input type="text" value="15"/>
Default Stock Days	<input type="text" value="14"/>
Enable Editing of Remote Inventory	<input type="checkbox"/>
Display 4 Decimal Places on Inventory Margins	<input type="checkbox"/>
Keep Focus on Part Number during Inventory Management	<input checked="" type="checkbox"/>
Create Negative POs during Stock Transfer	<input type="checkbox"/>
Disable Inventory Dashboards	<input type="checkbox"/>
Enable Leading 00 on 14 character Barcodes	<input type="checkbox"/>
Disable Obscure Inventory Notification	<input checked="" type="checkbox"/>
Exclude Net items from Invoice-wide Advanced Sales	<input type="checkbox"/>
Enable Serial Number Management	<input type="checkbox"/>

Image Network Share

Enterprise, Reports, Customers

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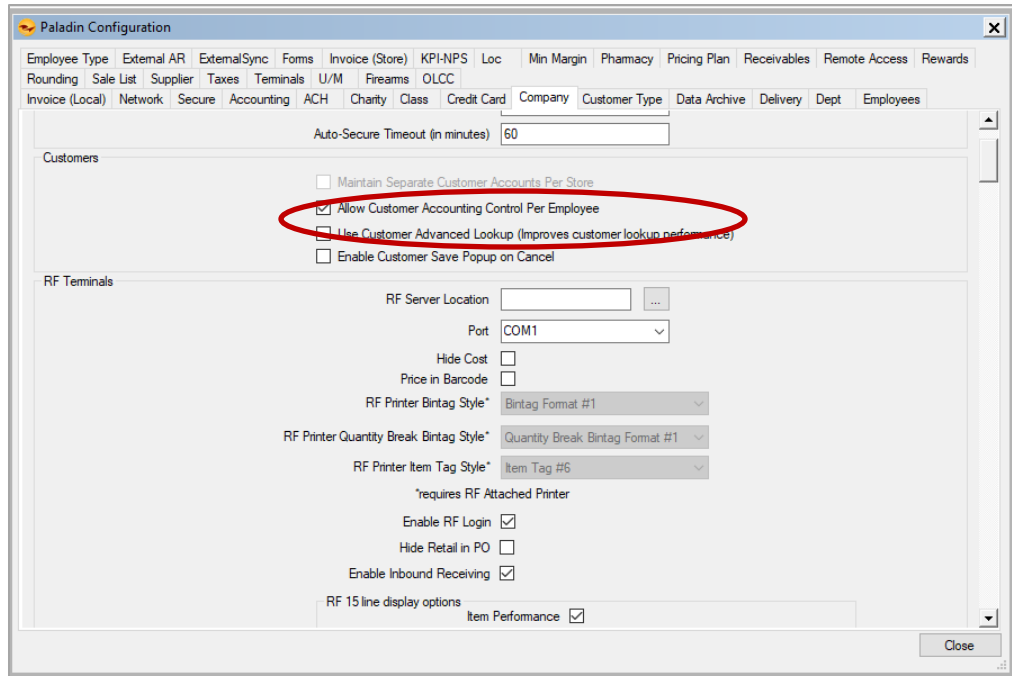
Reports

- Access the **Reports** module.

Daily Balance Reports Only

- Access **Daily Register Balance Report** only.

Customer Accounting Access



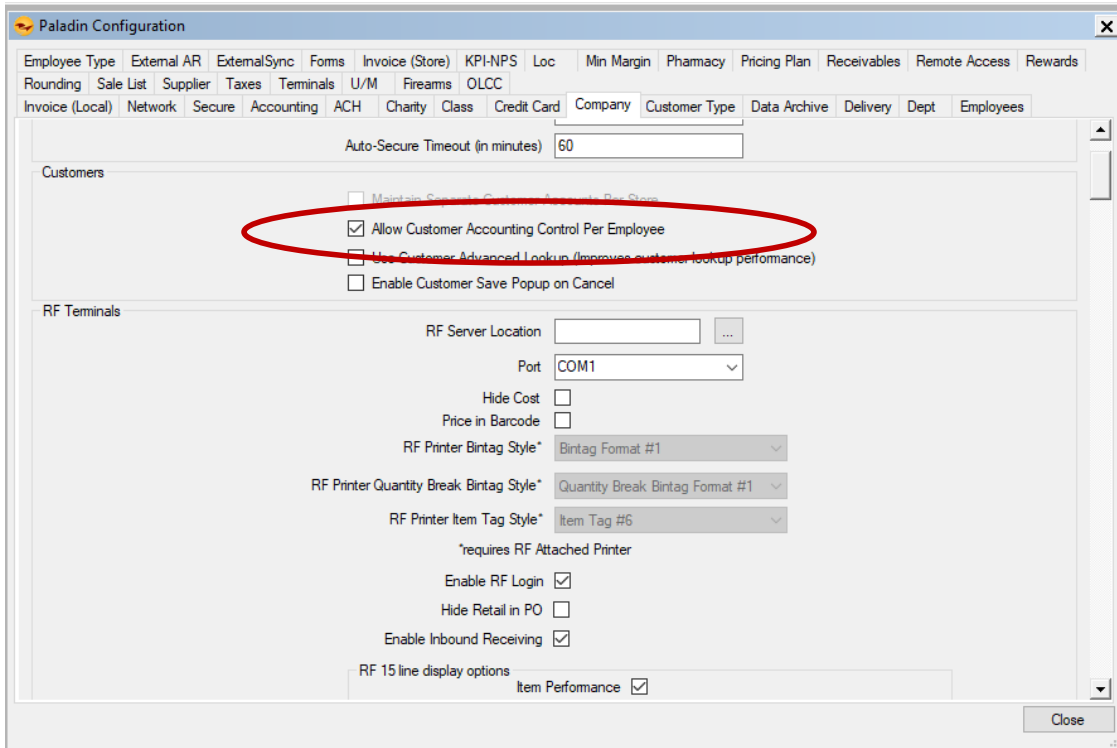
Maintain Customers Allow Customer Accounting Control Per Employee

Note: This setting is only available if the **Allow Customer Accounting Control Per Employee** option on the **File > Setup > Company** tab is selected.

- When available, this setting enables these permissions when **Maintain Customers** is selected.
 - Change a customer's credit limit or other settings related to a customer store account.
 - Delete a customer.
 - Rename a customer.
 - Add or change Projects and Authorized Signers.
 - Adjust Taxes.
 - Apply pricing plan discounts.

Allow Customer Accounting Control Per Employee

- Enabling this checkbox will allow you to control what level of access employees have to the customer module
- Once enabled on the customers tab two more check boxes will be accessible on the Employees tab



Paladin Configuration

Employee Type External AR ExternalSync Forms Invoice (Store) KPI-NPS Loc Min Margin Pharmacy Pricing Plan Receivables Remote Access Rewards Rounding Sale List Supplier Taxes Terminals U/M Firearms OLCC

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Data Archive Delivery Dept Employees

Auto-Secure Timeout (in minutes) 60

Customers

- Maintain Customers
- Allow Customer Accounting Control Per Employee
- Use Customer Advanced Lookup (Improves customer lookup performance)
- Enable Customer Save Popup on Cancel

RF Terminals

RF Server Location []

Port COM1

Hide Cost

Price in Barcode

RF Printer Bntag Style* Bntag Format #1

RF Printer Quantity Break Bntag Style* Quantity Break Bntag Format #1

RF Printer Item Tag Style* Item Tag #6

*requires RF Attached Printer

Enable RF Login

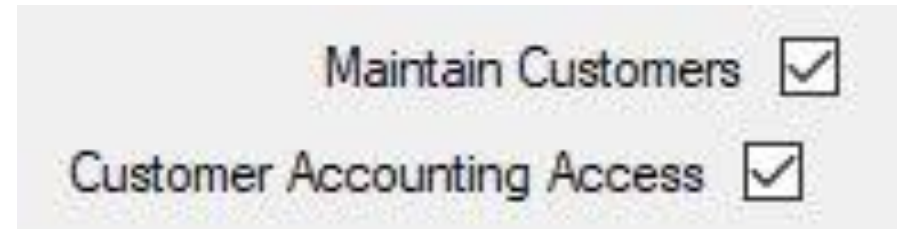
Hide Retail in PO

Enable Inbound Receiving

RF 15 line display options

Item Performance

Close



Maintain Customers

Customer Accounting Access

Allow Customer Accounting Control Per Employee

- Maintain Customers will allow employees to update contact info, set pricing plans/tax rates view balances and apply payments
- Customer accounting access will allow employees to update

Maintain Customers

Customer Accounting Access

\$ ▼ Credit

Balance Forward Stm. Open Item Stm.

Credit Limit:

Default PO # to use:

No Prompt Payment Discount

Trade Discounts

Percentage Respect Min Margin

Require PO on invoices?

Apply Service Charge?

Accept checks from customer?

Ignore Past Due Invoice Hold?

Match Authorized Signers List?

1 ▼ Sales History

Sales totals last 12 months: \$ 57,620.02 Profit totals last 12 months:

ACH, Profit Analyst

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Save ACH Data

- Saves ACH data in the **Customers** module if ACH processing is activated.

Profit Analyst

- Access the **Profit Analyst** feature at invoicing.
- Added ability to view by Average or Market cost.

Profit Analyst Cancel <input type="button" value="X"/>			
<input checked="" type="radio"/> Average Cost <input type="radio"/> Market Cost			
Item	Cost	Profit	Margin
Current Line	\$18.520	\$14.47	43.9%
Invoice	\$93.122	\$60.85	39.5%

Discounting

Manager Approval Required

Discounting Requires Manager Approval

Returns Require Manager Approval

Require Manager Approval for Returns Over \$ 0

- In invoice and quote, when F4 discount item is selected a password with manager override enabled is required
- Note: this does not trigger if the price is manually changed (minimum margin)
- Returns: set a dollar amount that if pierced requires a manager approval



Manager Approval

Cancel

Manager approval required...

Manager approval is needed in order to continue.

Enter manager password:

OK

Questions?

Learn More

To learn more, see the following resources in our [Help Portal](#) library

- [How to set up employee permissions](#)
- [Multi-store: Access to stores](#)
- [Admin Access level replaces Admin passwords](#)

A recording of this webinar will be available at portal.paladinpos.com/webinars.

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