Employee Permissions CRE

Invoice Discounts	Prompt	End Transactions	Prompt	Redeem Gift Cards	Prompt
Invoice Price Changes	Prompt	Hold & Print	Prompt	Sell Special Items	Prompt
Delete Items	Prompt	Open Cash Drawer	Prompt	Vendor Payouts	Prompt
Void Invoices	Prompt	Sell Non-Inventory	Prompt	Buybacks	Prompt
Allow Exit	Prompt	Tax Exempt Invoice	Prompt	Force Credit Cards	Prompt
Returns	Prompt	Sell Gift Cards	Prompt	Charge Below Floor	Prompt

There is a large number of permissions that can be configured in Employee Maintenance. Refer to the document entitled "Creating Employees" (found on http://faq.pcamerica.com) if you do not know how to configure these permissions.

This document will explain what actions are allowed or denied in Cash Register Express by individual permissions.

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Invoice Discounts determines whether or not the employee can apply discounts to invoices.

There are several methods of applying discounts and thus triggering this permission, all of them starting on the invoicing screen:

- Select **Options**, **Invoice Properties**, and then **Discount**.
- Select **Options**, **Invoice Properties**, and then **Desired Grand Total**.
- Selecting **DISCOUNT** below the invoice.

Invoice Price Changes determines whether or not the employee can select **PRICE CHANGE** below the invoice.

Delete Items determines whether or not the employee can select **DELETE** below the invoice.

Void Invoices determines whether or not the employee can void an invoice.

There are several methods of voiding invoices and thus triggering this permission, all of them starting on the invoicing screen:

- Select **Void Invoice.**
- Select **Invoice** and then **Void Invoice** on the upper left-hand corner of the screen.

Allow Exit determines whether or not the employee can exit from the invoicing screen by selecting **Exit**.

To apply this permission to exiting the program itself, follow these steps:

1. Select **Manager** from the login screen.
2. Provide the requested credentials.
3. Select **Setup**.
4. Select **Setup Screen**.
5. Select the **System Access** tab.
6. Check **Exit Permission when Exiting from Login Screen**.
7. Select **Update**.

Returns determines whether or not the employee can process returns.

There are several methods of processing returns and thus triggering this permission, all of them starting on the invoicing screen:

- Selling a negative quantity of an item after selecting **QUAN CHANGE** below the invoice.
- Scanning or entering the bar code printed on receipts and selecting **Return Items** on the window that pops up.
  - This is assuming that **Print Bar Code on "Complete" Receipts** is checked in the **Receipt** tab of **Setup Screen**.

End Transactions determines whether or not the employee can press **PAY** on the invoicing screen.

Hold & Print determines whether or not the employee can select **Options**, **Cashier**, and **Hold and Print** from the invoicing screen.

Open Cash Drawer determines whether or not the employee can open the cash drawer without making a sale first by selecting **Options** and then **Open Drawer** from the invoicing screen.

Sell Non-Inventory determines whether or not the employee can modify the price of an item by selecting **Invoice** and then **Sell Non-Inventory** from the top right-hand corner of the invoicing screen.

Tax Exempt Invoice determines whether or not the employee can make an invoice or items on an invoice tax-exempt.

There are several methods of making invoices or items on them tax-exempt and thus triggering this permission, all of them starting on the invoicing screen:

- Select **Options**, **Invoice Properties**, and then either **Tax Exempt Invoice** or **Tax Exempt Additional Items**.

Sell Gift Cards determines whether or not the employee can sell gift cards.

There are several methods of selling gift cards and thus triggering this permission, all of them starting on the invoicing screen:

- Select **NONE** and then **Gift Card** (both are displayed on the touchscreen by default).
- Select **Invoice** and then **Sell Gift Card** on the upper left-hand corner of the screen.

Redeem Gift Cards determines whether or not the employee can redeem gift cards.

There are several methods of redeeming gift cards and thus triggering this permission, all of them starting on the invoicing screen:

- Swipe a gift card.
- Select **PAY** and then **Gift Card.**

Sell Special Items determines whether or not the employee can sell items marked as "special" within Inventory Maintenance.

1. To mark an item as "special", follow these steps:
2. Select **Manager** from the login screen.
3. Provide the requested credentials.
4. Select **Inventory Maintenance**.
5. Navigate to an item.
6. Check **Special Permission**.
7. Select **Save**.

Vendor Payouts determines whether or not the employee can select **Vendor Payouts** after selecting **Manager** and **Tools** from the login screen.

Buybacks determines whether or not the employee can perform trades and buybacks in the split invoicing screen by adding an item to the invoice after selecting **BUY** or **TRADE**.

1. To enable the split invoicing screen, follow these steps:

2. Select **Manager** from the login screen.

3. Provide the requested credentials.

4. Select **Setup**.

5. Select **Display Setup**.

6. Select "Split Invoicing".

7. Select **Update**.

Force Credit Cards determines whether or not the employee can force a credit card transaction by selecting **PAY** from the invoicing screen, **Credit Card**, **Force**, entering appropriate information, and selecting **OK**.

Charge Below Floor Whether or not an employee can process a credit card for less than the floor amount. The **Floor Charge Amount** can be configured in the Setup Screen under Payment Processing via the **Other Options** tab.

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Cash Alert Override determines whether or not the employee can press **Override This Sale** when the cash lockup level is exceeded and they are prompted to remove cash.

To turn on cash alerts, follow these steps:

1. Select **Manager** from the login screen.

2. Provide the requested credentials.

3. Select **Setup**.

4. Select **Setup Screen**.

5. Select the **Quick Invoicing & Alerts** tab.

6. Check **Use Cash Alerts**.

7. Select **Update**.

Additionally, the employee's job code must have **Cash Bank** checked.

Cash Pickups determines whether or not the employee can select **Cash Pullout** after selecting **Options/Manager** and **Tools** or in response to a cash alert.

Issue Credit Slip determines whether or not the employee can issue a credit slip.

To issue credit slips for all returns, follow these steps:

1. Select **Manager** from the login screen.
2. Provide the requested credentials.
3. Select **Setup**.
4. Select **Setup Screen**.
5. Select **Invoice Settings**.
6. Select "Print Store Credit Slip" under "Return Media".
7. Select **Update**.

Redeem Credit Slip determines whether or not the employee can redeem a credit slip by scanning the barcode on it.

Override Refund determines whether or not the employee can override gift card refunds when returning items.

Automatic refunds to gift cards must be set up by following these steps:

1. Select **Manager** from the login screen.
2. Provide the requested credentials.
3. Select **Setup**.
4. Select **Setup Screen**.
5. Select **Invoice Settings**.
6. Select "Gift Card Only" under "Return Media".
7. Select **Update**.

Drawer Transfers determines if an employee can transfer money from their drawer to another employee's cash drawer via Vendor Payouts.

Allow Large Purchases determines whether or not the employee can sell an item flagged as a "large purchase".

To specify the amount that flags an item as a "large purchase", follow these steps.

1. Select **Manager** from the login screen.
2. Provide the requested credentials.
3. Select **Setup**.
4. Select **Setup Screen**.
5. Select the **Invoice Settings** tab.
6. Select **Page 2**.
7. Fill in the "Amount That Flags Item as a Large Purchase" field.
8. Select **Update**.

Approve Cash Count determines whether or not the employee can approve their own cash count when they log out. They won't be required to perform a cash count unless their job code has **Cash Bank** and **Require Cash Count Screen on Clockout** both checked.

Allow Old Returns determines whether or not the employee can override the "Valid Return Window," which is set by following these steps:

1. Select **Manager** from the login screen.
2. Provide the requested credentials.
3. Select **Setup**.
4. Select **Setup Screen**.
5. Select the **Invoice Settings** tab.
6. Fill in the "Valid Return Window" field.
7. Select **Update**.

Approve Emergency Clockout determines whether or not the employee can clock out other employees in an emergency by selecting the clock icon (located on the login screen), entering their credentials or swiping their card, and selecting **Emergency Clockout**. Note that this button will not appear if this permission is set to "No".

Pullback Invoice determines whether or not the employee can pull back, or reopen, an invoice by selecting **Options** from the invoicing screen and then **Pullback Invoice**.

Timeclock Management determines whether or not the employee can access the Timeclock Management screen.

There are two ways to access this screen:

- Select **Options/Manager**, **Administrative**, and then **Time Clock Management**.
- Select **Options/Manager**, **Administrative**, **Employee Maintenance**, and then **Time Clock Management.**

Edit Your Own Time determines whether or not the employee can press **Delete Clock-Out**, **Delete Entry**, **Modify Closeout,** or change their own times when accessing the **Time Clock Management** screen.

Discounts Below % determines whether or not the employee can apply a discount greater than the "Invoice Discount Security Level," which is set up by following these steps:

1. Select **Manager** from the login screen.
2. Provide the requested credentials.
3. Select **Setup**.
4. Select **Setup Screen**.
5. Select the **Invoice Settings** tab.
6. Select **Page 2**.
7. Fill in the "Invoice Discount Security Level" field.

Buyback/Trade Above Default determines whether or not the employee can change the price of an item that is being bought back or traded such that the price is above the "BuyBack Price" or "Trade Price" of that item.

To set the "BuyBack Price" or "Trade Price" of an item, follow these steps:

1. Select **Manager** from the login screen.

2. Provide the requested credentials.

3. Select **Inventory Maintenance**.

4. Select the item that will be bought back or traded.

5. Select the **Special Pricing** tab.

6. Modify the "BuyBack Price" or "Trade Price" field.

7. Select **Save**.

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End Cash Transactions determines whether or not the employee can select **Cash** after selecting **PAY** from the invoicing screen.

End Account Transactions determines whether or not the employee can select **On Account** after selecting **PAY** from the invoicing screen.

Override ID Scan determines whether or not the employee can press **Skip** when prompted to enter a birthday or scan an ID before selling an item.

Manual Age Entry determines whether or not the employee can enter a birthday when prompted to scan an ID before selling an item.

Override Emp Schedule determines whether or not the employee can allow another employee to clock in at a time that is not scheduled or too early or late relative to their scheduled time. Refer to the document entitled "Labor Scheduler" on http://faq.pcamerica.com if you are unfamiliar with the labor scheduler.

Labor Scheduler determines whether or not the employee can create and modify employee schedules using the Labor Scheduler. Refer to the document entitled "Labor Scheduler" on http://faq.pcamerica.com if you are unfamiliar with the labor scheduler.

Negative Price Changes determines whether or not the employee can select **PRICE CHANGE** below the invoice and change the dollar amount to a negative value (i.e. **-$20.00**).

Close Shift determines whether or not this employee can close an open shift through the **Close Shift** button on the invoice screen.

Reprint Receipt determines whether or not this employee can use the **Print Last Receipt** button in the Options screen under Cashier. Or if they can use the **Print** button after recalling an invoice.

Inventory

Add Inventory/Kits determines whether or not the employee can add inventory or kits.

There are several methods of adding inventory or kits and thus triggering this permission, all of them starting on the invoicing screen:

- Select **Add Item** or **Duplicate** in Inventory Maintenance.
- Select **Options**, **Administrative**, and then **Styles Matrix**.
- Select **Add** or **Duplicate** in Kit Maintenance.

Edit Inventory/Kits determines whether or not the employee can edit inventory or kits.

There are several methods of editing inventory or kits and thus triggering this permission, all of them starting on the invoicing screen:

- Select **Save** in Inventory Maintenance.
- Select **Options**, **Administrative**, and then **Mix 'N Match Pricing**.
- Select **Update** in Kit Maintenance.

Add Vendor determines whether or not the employee can select **Add** in Vendor Maintenance.

Update Vendor determines whether or not the employee can select **Save Changes** in Vendor Maintenance.

Add Department determines whether or not the employee can select **Add Department** in Department Maintenance.

Edit Department determines whether or not the employee can select **Save Changes** in Department Maintenance.

Create POs determines whether or not the employee can select **Add** after selecting **Options/Manager**, **Administrative**, and **Purchase Orders.**

PO Receive Items determines whether or not the employee can select **Receive Item** or **Receive All** after selecting **Options/Manager**, **Administrative**, and **Purchase Orders.**

Instant PO determines whether or not the employee can select **Instant PO** in Inventory Maintenance.

View Inventory determines whether or not the employee can access Inventory Maintenance even if he or she does not have the permissions "Add Inventory/Kits", "Edit Inventory/Kits", and "Add Coupons".

View Inventory Costs determines whether or not the employee can see the costs of items in Inventory Maintenance.

Negative Instant POs determines whether or not the employee can enter a negative number after selecting **Instant PO** in Inventory Maintenance.

Modify Price Promos (Existing) determines whether or not the employee can edit an item's **Special Pricing** tab in Inventory Maintenance.

Limited Edit Lockdown determines whether or not the employee who has the "Edit Inventory/Kits" permission also has permission to change the department of an item or change an item's description.

Delete Inventory/Kits determines whether or not the employee can select **Delete** in Inventory Maintenance or Kit Maintenance.

Add Coupons determines whether or not the employee can select **Coupon** after selecting **Add** in Inventory Maintenance.

Global Pricing determines whether or not the employee can select **Global Price Changes** after selecting **Options/Manager** and **Administrative**.

Customers

Add Customers determines whether or not the employee can select **Add** in Customer Maintenance.

Edit Customers determines whether or not the employee can select **Update** in Customer Maintenance.

Display Balances determines whether or not the employee can view a customer's A/R balance in Customer Maintenance.

Edit Charge at Cost determines whether or not an employee can select the **Charge at Cost** option in Customer Maintenance.

Reports

Display Reports determines whether or not the employee can:

- Select **Display** after selecting **Options/Manager**, **Administrative**, and **Reporting**.

- Select **Display On Hold IDs** after selecting **Options** and **Cashier**.

Print Reports determines whether or not the employee can select **Print** after selecting **Options/Manager**, **Administrative**, and **Reporting**.

Print DDR determines whether or not the employee can:

Select "Detailed Daily Report" in the reporting screen and select **Display**, regardless of his or her "Display Reports" and "Print Reports" permission.

- Select **File** and then **Detailed Daily Report** from the login screen.

Perform End of Day determines whether or not the employee can:

- Select **Options/Manager**, **Tools**, and then **End of Day**.

- Select **File** and then **End of Day** from the login screen.

View Historical Reports determines whether or not the employee can display or print reports beyond the "Viewable Report History," which is set up by following these steps.

1. Select **Manager** from the login screen.

2. Provide the requested credentials.

3. Select **Setup**.

4. Select **Setup Screen**.

5. Select **Reports**.

6. Modify the "Viewable Report History" field. Note that the unit of time is days.

7. Select **Update**.

Setup

Company Info determines whether or not the employee can:

Select **Options/Manager**, **Setup**, and then **Setup Screen.**

Select **Options/Manager**, **Setup**, and then **Friendly Printer Setup**.

Tax Rates determines whether or not the employee can select **Options/Manager**, **Setup**, and then **Tax Rates**.

Bonus Plan determines whether or not the employee can select **Options/Manager**, **Setup**, and then **Customer Loyalty**.

Price Levels determines whether or not the employee can select **Options/Manager**, **Setup**, and then **Price Levels**.

Display Settings determines whether or not the employee can select **Options/Manager**, **Setup**, and then **Display Setup**.

Accounting Interface determines whether or not the employee can select **Options/Manager**, **Setup**, and then **Quick Books Sales Pass**.

Touchscreen Config determines whether or not the employee can select **Options/Manager**, **Setup**, and then **Touch Screen Configuration**.

Backup Database determines whether or not the employee has the credentials to back up the database by selecting **File, Database Maintenance**, and then **Backup Database** from the login screen.

Settle Credit Cards determines whether or not the employee can select **Settle** after selecting **Options/Manager**, **Administrative**, and **Credit Card Settlements**.

Configure Receipt Notes determines whether or not the employee can select **Options/Manager**, **Setup**, and then **General Invoice Notes**.

Add Employees determines whether or not the employee can select **Add Employee** or **Duplicate** in Employee Maintenance.

Modify Employees determines whether or not the employee can select **Save Changes** in Employee Maintenance.

Handheld

Note that these permissions apply to employees who are using Pocket Inventory on a handheld device.

Create Purchase Orders determines whether or not the employee can select **Purchase Orders** and then **Create PO**.
Create DSD determines whether or not the employee can select **Purchase Orders** and then **Create DSD**.
Create DSD Credit determines whether or not the employee can select **Purchase Orders** and then **Create DSD Credit**.
Receive POs determines whether or not the employee can select **Purchase Orders** and then **Receive PO**.
Inventory Edit determines whether or not the employee can select **Edit**.
Inventory Adjust determines whether or not the employee can select **Adjust**.
Inventory Count determines whether or not the employee can select **Count**.
Setup determines whether or not the employee can select **Menu** and then **Setup**.