



## Creating a Cashier Role

The Cashier Role gives permission to add other entities into a User Class. The role also provides access to perform directory searches in LDAP. Cashiers may deposit tender into an account but they are not permitted to make withdrawals. An entity with Cashier Role also has access to the Cashier Report which defaults to the current day's transactions.

The Cashier Role is intended for someone at the customer's site who receives tender and applies it to other user's accounts. They will typically stay on the Manager User screen at all times, need to have quick account creation, and be able to easily run the Cashier Report to account for any tender amounts that are in their care.

The following ACL permissions assigned to an Admin User Class allows a staff member to have access to"

**Rights:** add and delete quota users, add additional user classes to an account, and manually add funds to an account.

**Restrictions:** cannot change users pin once it's been set, cannot apply a negative amount to a user's quota. Note: if you require your cashiers to have these rights then you must grant the Cashier the GoPrint Users with the Write permission.

	Feature	Permission
	GoPrint Users	Not Specified
	PayStation	Not Specified
	PayPoint	Not Specified
	Pricing	Not Specified
	Agents	Not Specified
	Reprint Archive	Not Specified
User quota Refunds – All Access	Non Financial Reports	Not Specified
	System Admin	Not Specified
Cashier Role – All Access	User Quota Refunds	All Access
	Cashier Role	All Access
	NetLink	Not Specified



## Logging in as the Cashier Account

From the main login screen a cashier as the following options:

1. Enter an existing account ID to search for a specific user
2. Select the Search Directory button to create new Student quota users via Any various LDAP profiles set-up by the system administrator.
3. Click the Create a new account link to manually set-up a new quota user recommended task for creating day guest users or non-students.

## Creating a New Non-Student quota account and adding paid funds

**Step 1** - Click on the Create a new account link as noted in prior step 3.

Create an User-friendly Account ID. This will be the name the user must use to login with.

Enter a First name

Enter a Last name

Email: Optional and does not perform any function.

Create initial pin  
Verify Pin

Reference No: leave blank

Make sure the Active checkbox is checked.

Class:

### Create New Account

You may create a new account here and save it when done. The 'Save and Add' feature may be used to quickly add several accounts.

#### Account

Account ID	manderson
First Name	Mike
Last Name	Anderson
Email	
Card No	
Initial PIN	*****
Verify PIN	*****
Reference No	

Active

Credit Hold

Class	(None)
	(None)
	Default User Class
	Grad students
	DAY GUESTS

Save and add another account.




**Important:** to prevent unwanted funds, such as student scheduled quota, to be automatically assigned to a non-student you **MUST** correctly add the users to the correct User Class from the Class drop down menu. In the example, a Day GUESTS class was created early by the system admin. All non-students must be placed in this class when creating the account. Refer to the Creating Quota Users section in your user guide.

Click SAVE and ADD

## Adding Funds to the Account

Return back to the Main Account Search Screen and enter the Account ID you just created in the Account ID field.



The newly created account appears:

 **Account Search**

You may search for accounts and perform bulk operations on selected accounts. Search results are cached between searches to make it easier to work with large lists of accounts.

Account ID	<input type="text" value="manderson"/>	Class	<input type="text" value="Any Class"/>
Last Name	<input type="text"/>	First Name	<input type="text"/>
Card #	<input type="text"/>	Email	<input type="text"/>
Records Per Page	<input type="text" value="100"/>	Ref #	<input type="text"/>
Active / Inactive	<input type="text" value="Both"/>	Inactive Since (mm/dd/yyyy)	<input type="text"/>

**Related Acth**

-  [Create a new acc](#)
-  [Cashier Report](#)

### Found 1 Account

<input type="checkbox"/>	Account ID	Full Name	Email	Card No	Ref No	Status	Last Updated
<input type="checkbox"/>	manderson	Anderson, Mike				Active	09/08/2008

### Adjust Balance

Adjust Purse  By Amount

Adjust Reason

1. Check the checkbox to highlight the account
2. Scroll down the Adjust Purse section and select the non-student purse
3. Enter the amount paid
4. Adjust Reason: select a customizable reason for the adjustment. Refer to note below
5. Click the Adjust Balance button



### Found 1 Account

<input type="checkbox"/>	Account ID	Full Name	Email	Card No	Re
<input checked="" type="checkbox"/>	manderson	Anderson, Mike			

### Adjust Balance

**Adjust Purse**  By Amount   
**Adjust Reason**

The balance adjustment confirmation message appears

**Hint:** the Adjust Reason feature is a solely customizable feature that must be enabled by the sys admin and set-up prior to attempting to adjust a users balance. To do so, from the select Accounts – Transaction Notes – Add a Transaction Note.

Setup Transaction Notes

	Note
	Job did not print out
	Poor quality
<input checked="" type="checkbox"/>	NEW Non Student Paid Account



To confirm the balance was added, under the Account ID column, click on the link representing the user account.



### Account Properties for manderson

This screens allows you to edit the account for manderson, including class memberships which define the account's permissions and purses. Print job and transaction history is also viewable here.

This will take you to their profile properties page.

Account Member Of Print Jobs  
Transactions Login History

#### Account

Account ID	manderson
First Name	Mike
Last Name	Anderson
Email	
Card No	
New PIN	
Verify PIN	



### Account Properties for manderson

This screens allows you to edit the account for manderson, including class memberships which define the account's permissions and purses. Print job and transaction history is also viewable here.

Click the Member Of button to view The user's current balance

Account Member Of Print Jobs  
Transactions Login History

#### Member Of

<b>Class Membership</b>
<input checked="" type="checkbox"/> DAY GUESTS
(pick one) <input type="button" value="Add to Class"/>

#### Current Purses

Purse Name	Balance	Credit Limit Remaining
DAY GUESTS - NON STUDENTS (Allowance)	5.00	0.00

Credit is currently not allowed in the system.