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 too"

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.

User quota Refunds – All Access

Cashier Role – All Access

Feature	Permission
GoPrint Users	Not Specified
PayStation	Not Specified
PayPoint	Not Specified
Pricing	Not Specified
Agents	Not Specified
Reprint Archive	Not Specified
Non Financial Reports	Not Specified
System Admin	Not Specified
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

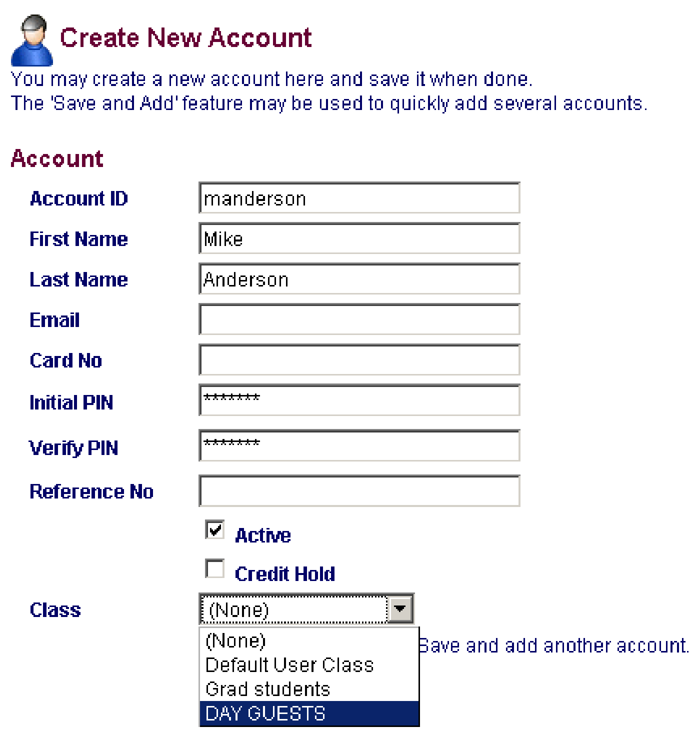
Email: Optional and does not perform any function.

Create initial pin
Verify Pin

Reference No: leave blank

Make sure the Active checkbox is checked.

Class:



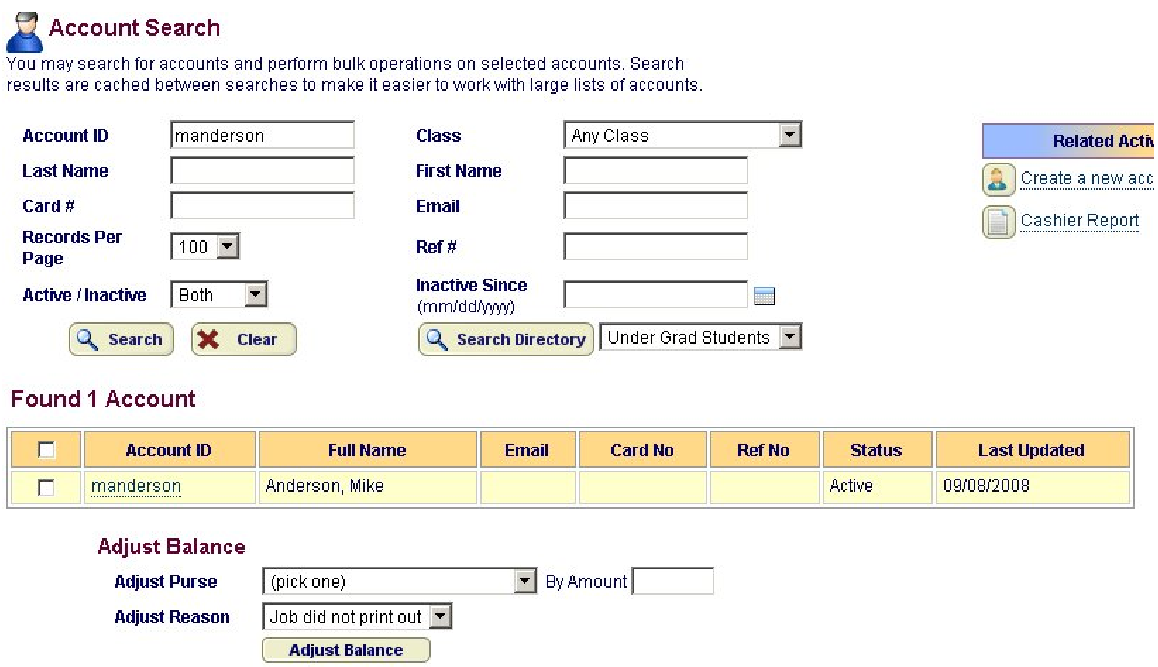
Important: to prevent unwanted funds, such as student scheduled quota, to be automatically assigned to a non-student you **MUST** correctly add the users to the correct User Class from the Class drop down menu. In the example, a Day GUESTS class was created early by the system admin. All non-students 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

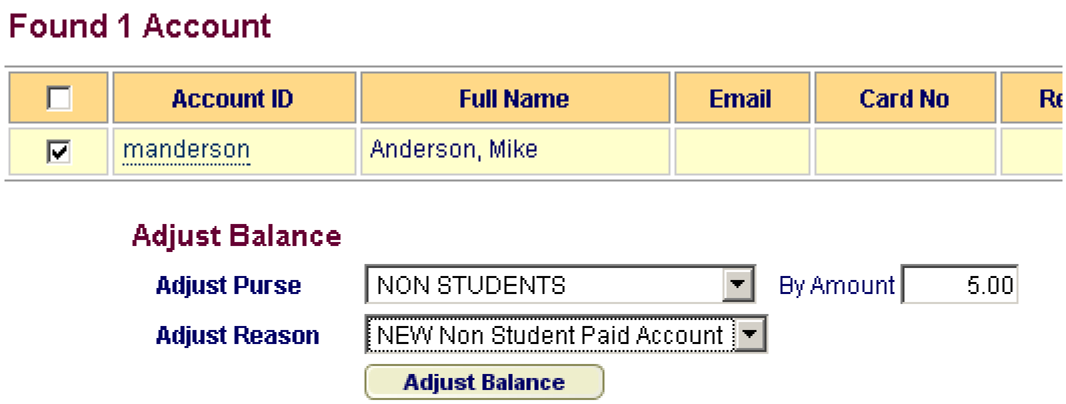
Adding Funds to the Account

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:

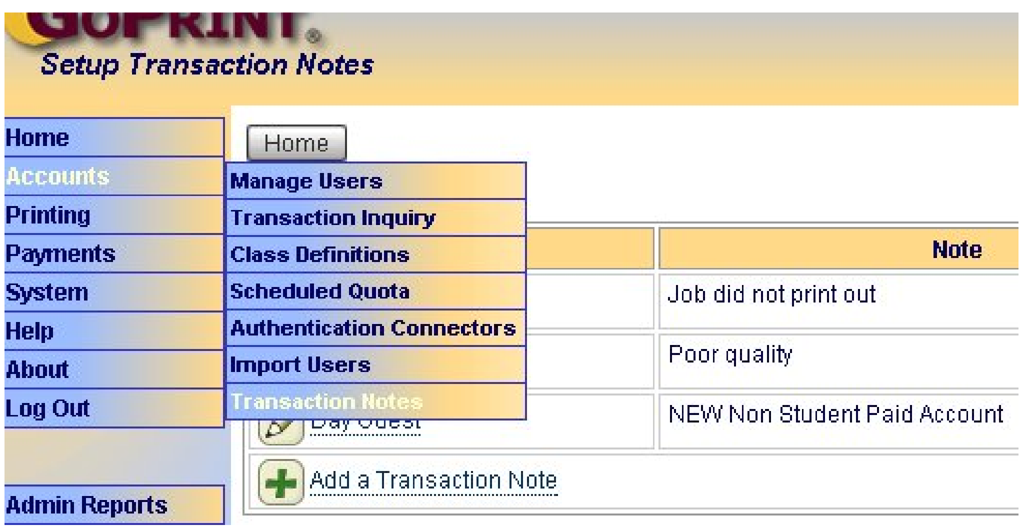


1. Check the checkbox to highlight the account
2. Scroll down the Adjust Purse section and select the non-student purse
3. Enter the amount paid
4. Adjust Reason: select a customizable reason for the adjustment. Refer to note below
5. Click the Adjust Balance button

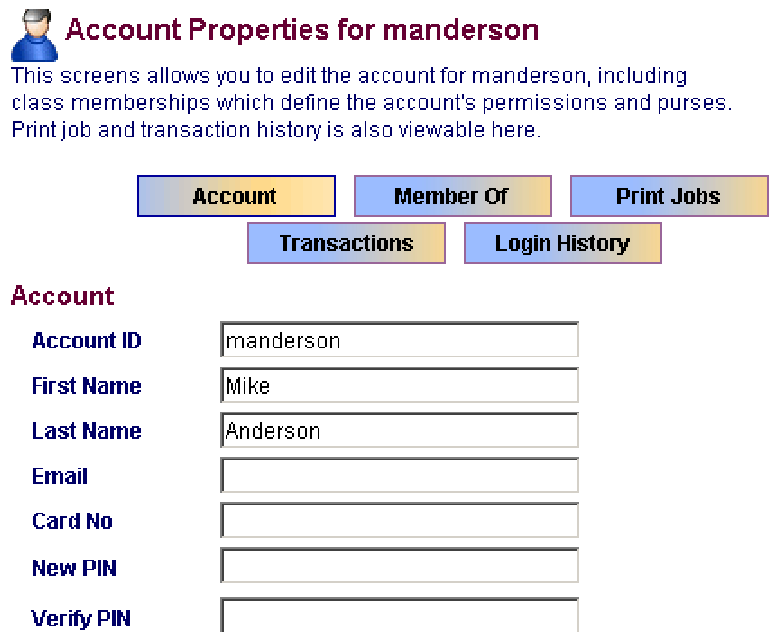


The balance adjustment confirmation message appears

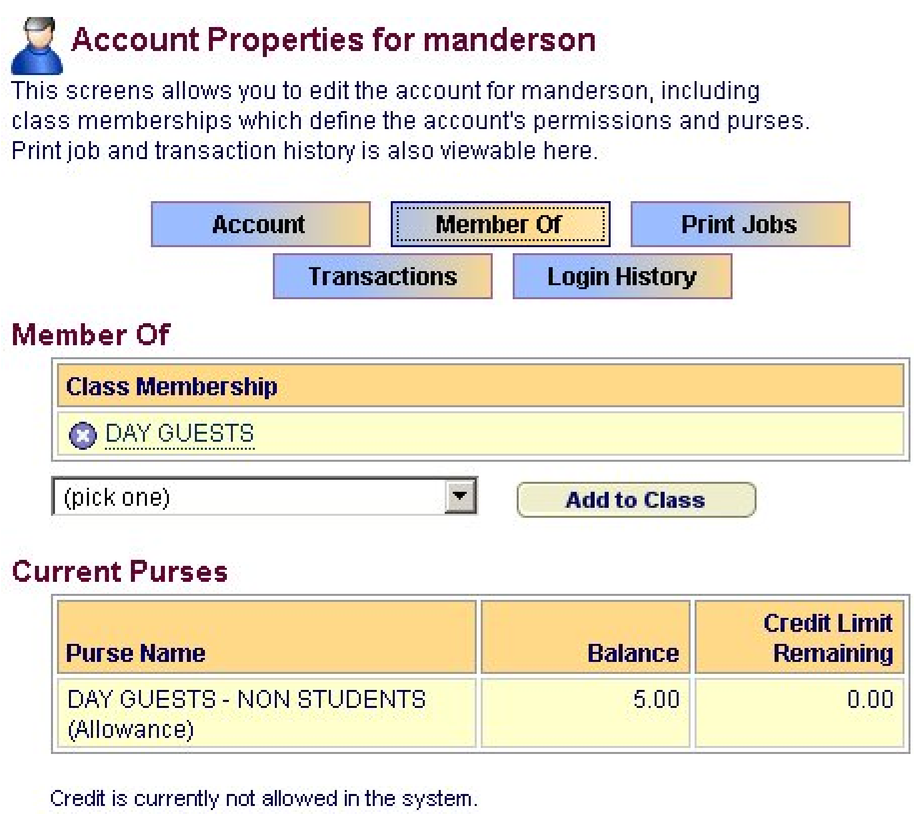
Hint: the Adjust Reason feature is a solely customizable feature that must be enabled by the sys admin and set-up prior to attempting to adjust a users balance. To do so, from the select Accounts – Transaction Notes – Add a Transaction Note.



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



This will take you to their profile properties page.



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