Tips for Setting Up Security in RetailEdge

POS Operations · https://retailedge.com/docs/anthony-cares-tips-for-setting-up-security-in-retailedge

Why turn on Security in RetailEdge?

Security is one of those topics that comes up quite frequently. Security and Clerk tracking go hand-in-hand in RetailEdge. It is important and sometimes crucial for store managers and higher ups to be able to see what their store clerks are doing on a day-to-day basis. Inventory items mysteriously getting deleted? Suspicious of a clerk discounting items for friends? Want to see a commissions report for each clerk? These are all examples of employee management RetailEdge can do. That's why we implemented an effective security measure to make sure only the right employees have access to certain actions in RetailEdge.

First and for most have a plan. How many different Groups are you looking to have? For example it could be divided by the chain of command:

- Clerks
- Supervisors
- Managers
- General Managers/Key Influencers
- Ownership

Once you define that, next is to understand how security in RetailEdge works. We use a numerical value system to either allow actions or block actions. We use a system of 0-99 where a user with a 99 level has full access to the system.

So lets take those Groups and assign levels:

- Clerks: 20

- Supervisors: 40
- Managers: 60
- General Managers/Key Influencers: 80
- Ownership: 100

So with those levels, Clerks could only do action list items (more on this later) set to level 20 and below.

Now you can start to create your clerks(Users). For the how to, click here.

Once you have your clerks (Users) setup, it is now time to take a look at the Action List items to see which groups we would like to assign them to. I highly recommend printing off the action list.

In RetailEdge, select **Reports** | **Misc** | **Action list**.

The Report is the Items in the action list and the current levels they are set to. With this report you can then go line by line and see if you need to make adjustments to either restrict actions or allow them. Remember that your RetailEdge users are only able to do their action list level and below.

Once you have gone through the Action List report and have decided what changes you needed to make, now is the time to go ahead and edit the action list. I am going to point you to this Help document that goes over the steps to editing the action list and setting up security.

Pro Tips:

ALWAYS create a backup of your data before turning Security on.

Make sure that you create at least one level 99 user, even if all your Action List items are level 80 and lower ALWAYS have a level 99 user that can go in and make changes just in case.