

Touchretail Device Controller – User Guide

Background

The Touchretail Device Controller is a browser based application that can be used to centrally control devices which are part of Touchretail's instore management solutions. This guide refers to using the Device Controller for creating and editing Staff names (Cashiers), till login numbers and feature access levels for Touchretail POS software.

Most retailers create 3 user levels, which may be Band 1, Band 2, Band 3 or Cashier, Supervisor, Manager. The top level may have access to everything, or there may be an additional Administrator level.

Device Controller access

Each system that has the Device Controller in operation will be set up with a system name, user names and passwords. The URL for accessing Device Controller will be sent to each system administrator along with the user names and passwords.

View Device Controller

When Device Control is accessed, you will see the following menu:



Any existing Users will be displayed below the menu.

Create a New User

Click on the Add symbol  and select the User button for Create New user.



The New User Details form will be displayed.

Complete the fields according to the new user (cashier) details. Use the right hand scroll bar to scroll down through all fields. Some fields can be left blank, but the fields that must be completed are:

- Display name
- First name
- Last name
- Login code

The Display name will print on the receipt and show on the customer display, and is a maximum of 10 characters long.

The Login code will be used to log into the till. If using a barcoded keyfob, the barcode should be scanned at this point.

The Device code is the User's unique ID and is allocated by Device Controller (this is not editable).

Set the User Group (level) that you want to allocate to this cashier. The lowest level is allocated by default – use the drop-down arrow to change the User Group.

Once the necessary fields have been completed for the User Details, click on the Device Groups tab. Select the appropriate Device Group(s) for this User. Device Groups will usually be set up as Branches, but could be a group of tills (in a Department) or individual tills.

When you click on 'OK' the new user will be saved to the User list and the list will re-display, sorted by Display name.

Edit User

Click on the 'Settings' area of the User card (Settings is the grey icon below the User Name and device Code number), then edit the appropriate Details fields and/or Device Groups. When the User details have been edited, click 'OK' to save, and the User list will re-display, sorted by Display name.

Change Display Order

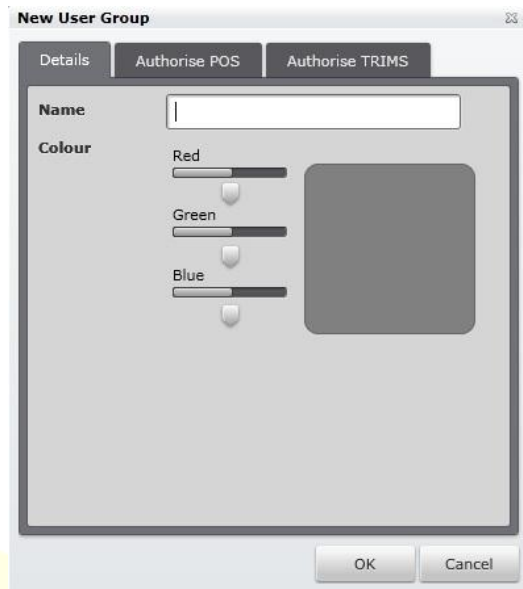
When editing Users, it may be preferable to view the user list in sorted by various fields. This can be done by clicking the drop-down arrow in the 'Display name' box (the current sort field will be shown in this box, so that will be the wording shown). The fields that can be used to sort the User list will be shown:



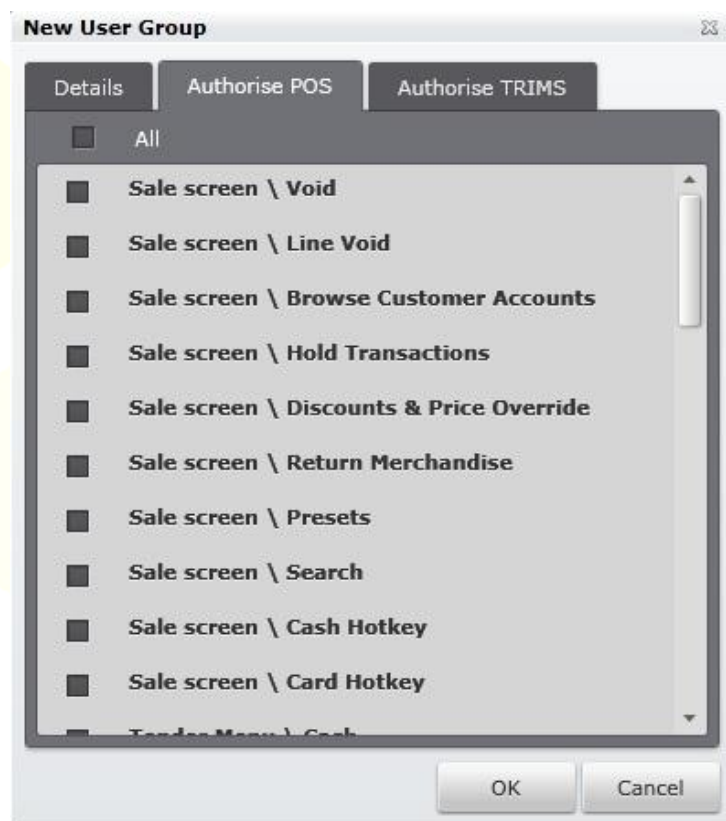
Click on the preferred sort field, then click on 'Sort' to change the order of the User list.

User Groups

Users are allocated to a User Group. In the case of cashiers, the User Groups may be Sales Assistant, Cashier, Supervisor, Manager etc. Each User Group will have a different profile. To create a new User Group, click on the Add symbol and select User Group.



Type in the name of the new User Group, and select a colour for the card so that it will be different from the other existing card colours. Next click on the 'Authorise POS' tab, and select the POS functions that are allowed for users belonging to this User Group.




Depending on the Touchretail software modules installed, there may be several 'Authorise ...' tabs, such as 'Authorise TRIMS' which determines which reports this User group has access to. When all Authorise tabs have been completed, click 'OK' to save the settings for the new User group.

Edit User Groups

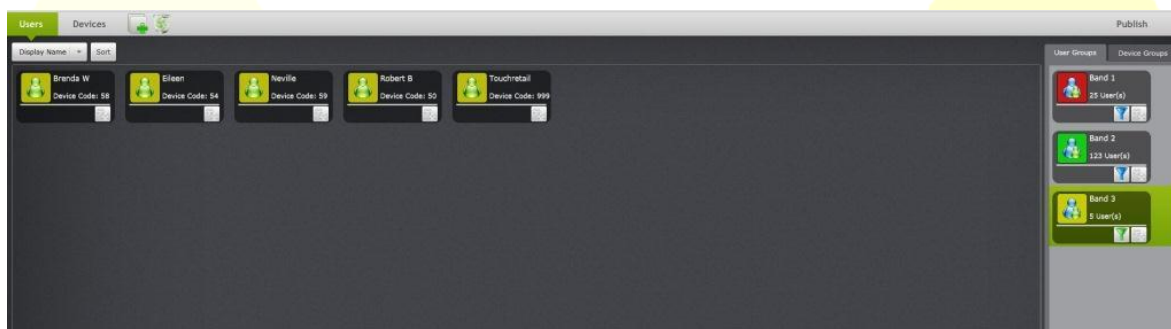
To edit existing User Groups click on the grey 'Settings' icon of the User Group card. Then follow instructions as for new User group above.

Delete Users or User Groups

To delete a User or User Group, drag its card to the Recycle Bin  and hover over the Bin until you see the word 'Delete' appear. The reminder message 'Are you sure you want to delete ...?' will appear. Click on either Accept to confirm delete or cancel.

Filter

The Filter icon on the User Group card enables you to filter the screen list of Users belonging to one or more User Groups. The Filter icon is normally blue. When you click on the Filter icon of a User Group it will turn green, and only the Users belonging to that User group will be displayed on screen.



You can click on more than one User group to display users for several User Groups – all the User groups with green coloured Filters will be displayed.

Click again on the Filter icon to toggle it back to blue, and display all Users.

Publish

Remember that any changes made in Device Control are not sent to the tills until you press the 'Publish' button. After clicking on 'Publish' the reminder message 'Are you sure you want to publish? This will affect all tills' is displayed. Click on Accept to publish the edited Device Control settings or Cancel.

The newly published Device Control settings will be picked up on the next Salespush cycle (usually set to every 30 seconds) and sent to the tills. The tills will be updated when at their Login screen.

When the edited Device Control file has been successfully published a prompt 'Success' will be displayed. If any other message is displayed the publish will not have been successful, in which case the problem will need to be resolved (for instance if the browser session has terminated or become off-line during the session).

Devices and Device Groups

Device Groups can be created for different branches or groups of tills for instance, so that a User may only be allowed access to specified tills at specified branches. This feature is usually set up and edited by Touchretail technical team so should not be edited by system users.

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