

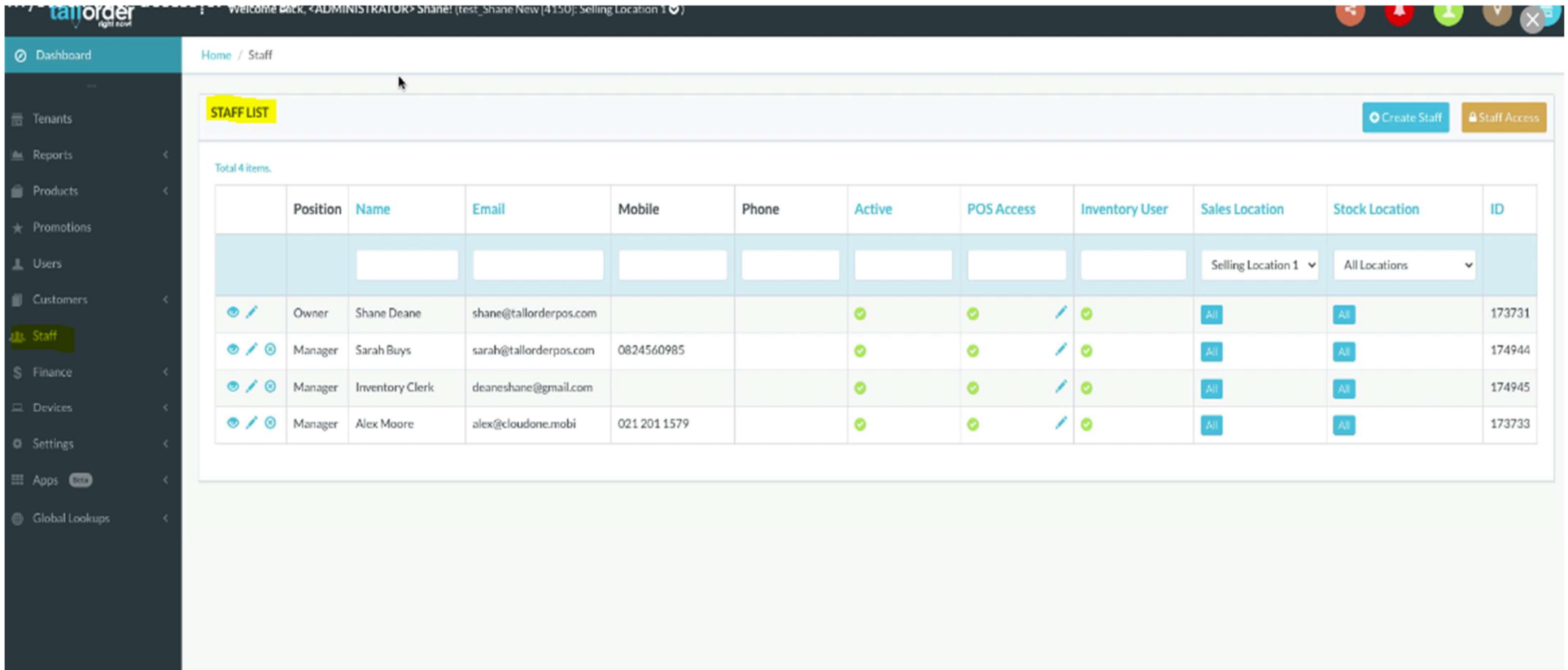
TALLORDER SOLUTIONS

MYSTOCK USER ACCESS & SETTINGS

TallOrder / myStock User Access and Settings Manual

Follow these steps to set up user access and settings in myStock:

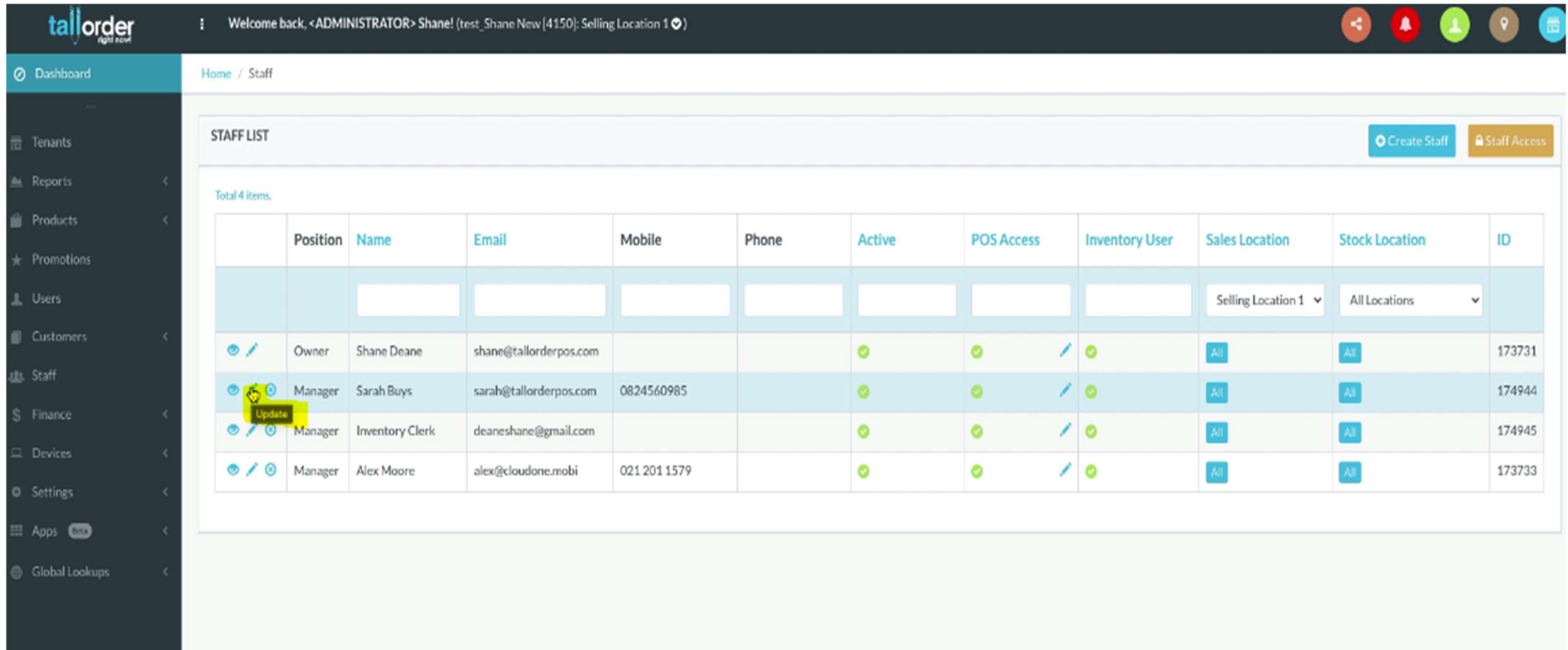
1. Go to your TallOrder Back Office.
2. As the owner, you have the authority to determine which staff members will have access to myStock. Select "Staff" from the menu to view the staff list.
3. Choose the staff members who will be using myStock.



The screenshot shows the TallOrder Back Office interface. The left sidebar contains a menu with options: Dashboard, Tenants, Reports, Products, Promotions, Users, Customers, **Staff** (highlighted), Finance, Devices, Settings, Apps, and Global Lookups. The main content area is titled 'Home / Staff' and features a 'STAFF LIST' header with 'Create Staff' and 'Staff Access' buttons. Below the header, it states 'Total 4 items.' and displays a table with the following data:

	Position	Name	Email	Mobile	Phone	Active	POS Access	Inventory User	Sales Location	Stock Location	ID
									Selling Location 1	All Locations	
	Owner	Shane Deane	shane@tallorderpos.com						All	All	173731
	Manager	Sarah Buys	sarah@tallorderpos.com	0824560985					All	All	174944
	Manager	Inventory Clerk	deaneshane@gmail.com						All	All	174945
	Manager	Alex Moore	alex@cloudone.mobi	021 201 1579					All	All	173733

















To set up myStock user access, click on the "Update" button for the respective staff member and select "Update User Access".



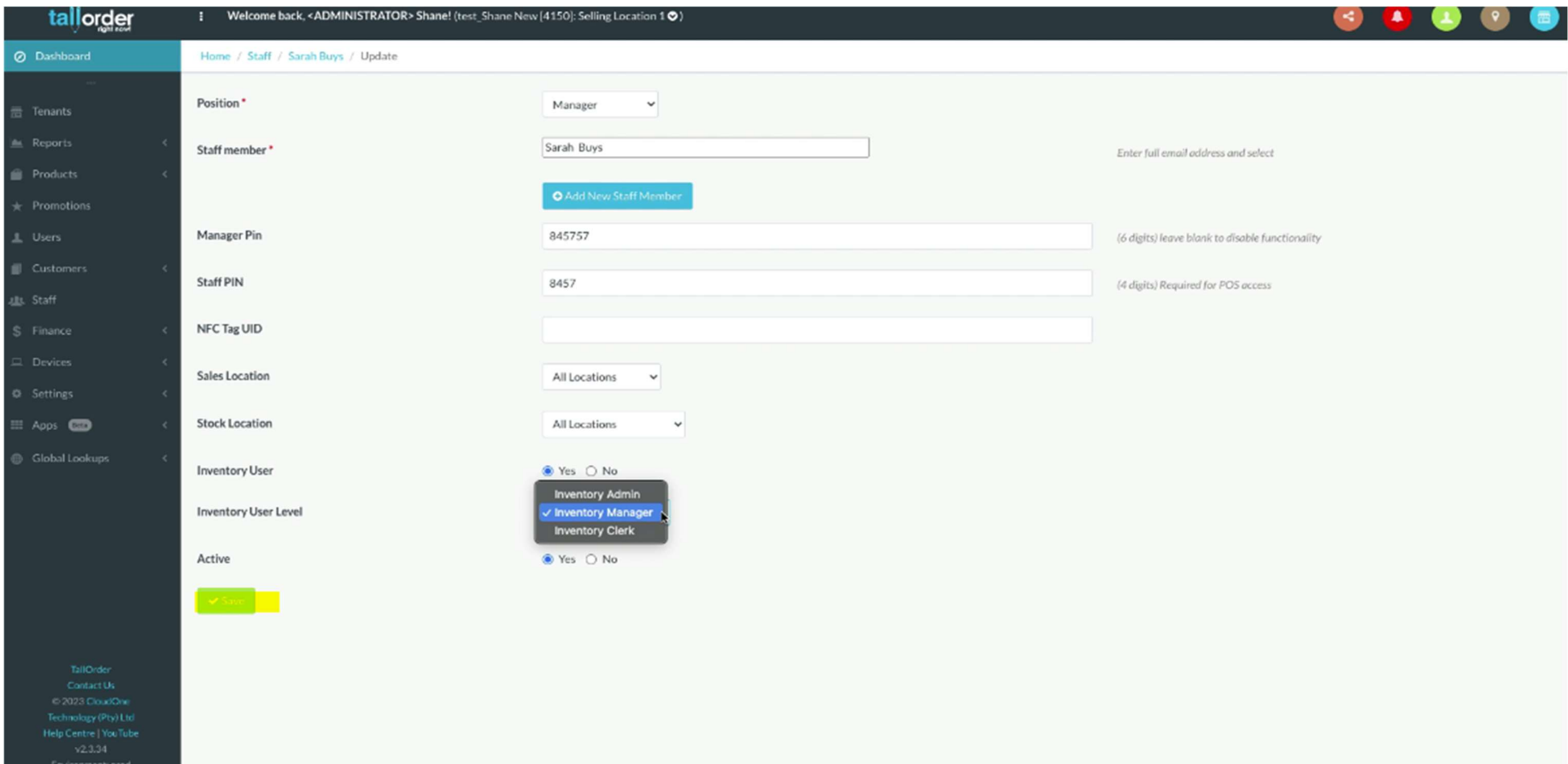
STAFF LIST

Create Staff Staff Access

Total 4 items.

	Position	Name	Email	Mobile	Phone	Active	POS Access	Inventory User	Sales Location	Stock Location	ID
									Selling Location 1	All Locations	
	Owner	Shane Deane	shane@tallorderpos.com						All	All	173731
	Manager	Sarah Buys	sarah@tallorderpos.com	0824560985					All	All	174944
	Manager	Inventory Clerk	deaneshane@gmail.com						All	All	174945
	Manager	Alex Moore	alex@cloudone.mobi	021 201 1579					All	All	173733

- At the bottom of the screen, you will find the "Inventory User" option.
- Select "Yes" or "No". Choosing "Yes" means that the staff member will be using myStock.
- If you select "Yes", the "Inventory User Level" will appear.
- You can choose from three different user levels: Inventory Admin, Inventory Manager, and Inventory Clerk.
- After selecting the appropriate user level, click on "Save".



talorder right now!

Welcome back, <ADMINISTRATOR> Shane! (test_Shane New (4150): Selling Location 1)

Dashboard Home / Staff / Sarah Buys / Update

Position * Manager

Staff member * Sarah Buys Enter full email address and select

[Add New Staff Member](#)

Manager Pin 845757 (6 digits) leave blank to disable functionality

Staff PIN 8457 (4 digits) Required for POS access

NFC Tag UID

Sales Location All Locations

Stock Location All Locations

Inventory User ☒ Yes ☐ No

Inventory User Level

Inventory Admin

☒ Inventory Manager

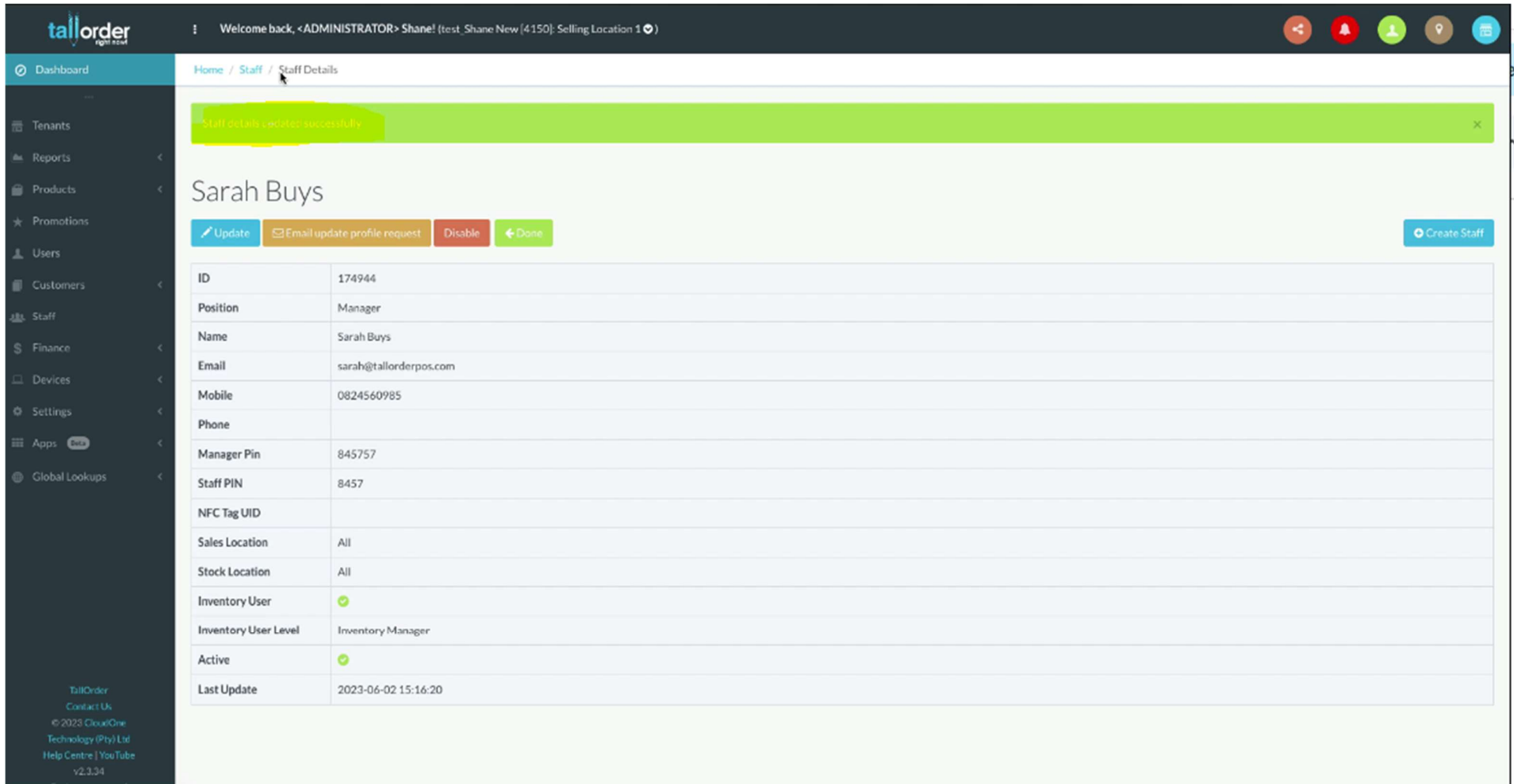
Inventory Clerk

Active ☒ Yes ☐ No

[Save](#)

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Environment: prod

Once you click on "Save", you will be redirected to a screen where you will see a green tab at the top indicating "Staff details updated successfully".



Welcome back, <ADMINISTRATOR> Shane! (test_Shane New [4150]; Selling Location 1)

Home / Staff / Staff Details

Staff details updated successfully

Sarah Buys

[Update](#)
[Email update profile request](#)
[Disable](#)
[Done](#)
[Create Staff](#)

ID	174944
Position	Manager
Name	Sarah Buys
Email	sarah@tallorderpos.com
Mobile	0824560985
Phone	
Manager Pin	845757
Staff PIN	8457
NFC Tag UID	
Sales Location	All
Stock Location	All
Inventory User	✓
Inventory User Level	Inventory Manager
Active	✓
Last Update	2023-06-02 15:16:20

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Access Settings Potential

Staff Details x root x Access Control x +

tailorderpos.monday.com/boards/3538917227/pulses/3538917236?asset_id=901180168

Screenshot 2023-06-02 at 3.37.06 PM.png

Access Control > Doc Comments > Files column

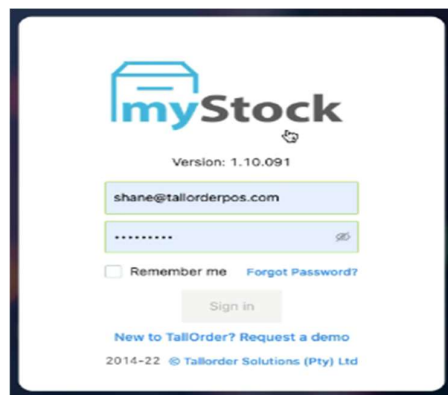
Access Settings Potential				
Staff Settings: Inventory Users				
Actions	Owner	Inventory Admin	Inventory Manager	Inventory Clerk
Accept Orders	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Month-End	ALWAYS	ALWAYS	POSSIBLE	IMPOSSIBLE
Product	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Production	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Purchase Order	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Purchase Order: Auto Receive	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Receive Stock: View Receiving	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Receive Stock: Cancel Outstanding	ALWAYS	ALWAYS	POSSIBLE	IMPOSSIBLE
Receive Stock: Complete Receive Orders	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Receive Stock: Receive Delivered	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Receive Stock: Update Cost	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Receive Stock: Update Prices	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Reports	ALWAYS	ALWAYS	POSSIBLE	IMPOSSIBLE
Settings	ALWAYS	ALWAYS	POSSIBLE	IMPOSSIBLE
Stock Enquiries	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Stock Enquiries: Edit Item	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Stock Enquiries: Price Update	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Stock Enquiries: Recipe Edit	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Stock Issue	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Stock Requisition	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Stock Take	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Stock Take: Complete Initial	ALWAYS	ALWAYS	POSSIBLE	IMPOSSIBLE
Stock Take: Recount	ALWAYS	ALWAYS	POSSIBLE	IMPOSSIBLE
Stock Transfer	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Supplier Return	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Waste	ALWAYS	ALWAYS	POSSIBLE	POSSIBLE
Can be added to Approvals	YES	YES	YES	NO
POSSIBLE	Means Explicit Access Control must be granted			

Access Settings Potential:

There are three user levels in myStock:

- Owner or Inventory Admin: This level of access allows editing of all types of actions in myStock, including month-end tasks, production, receiving or purchase orders, reports and settings, stock issues, requisition, stock takes, and transfers.
- Inventory Managers: These staff members have slightly different access levels. As an inventory manager, they have the potential to access all stock actions. The owner can grant explicit access control to inventory managers, deciding whether they have access to all actions or only specific ones such as purchase orders, receiving stocks, stock inquiries, and stock takes.
- Inventory Clerk: The inventory clerk has limitations on certain actions. They do not have access to month-end tasks, canceling outstanding orders, reports, settings, initial stock takes, or recounting of stock takes. Adjustments to these settings can be made in myStock. Although a staff member with inventory clerk access can be granted approval for certain stock actions, they will never be allowed to approve anything.

After setting up user levels for all staff members, proceed to sign in.



- Once signed in, go to the settings and click on "Access Control".
- Access control is applicable only to inventory managers and inventory clerks. Owners and admins have access to everything.

lmyStock test_Shane New [4150] - 1- Stock Location [4096]

Stock Actions 2023-05-26 → 2023-06-02 Filter 23

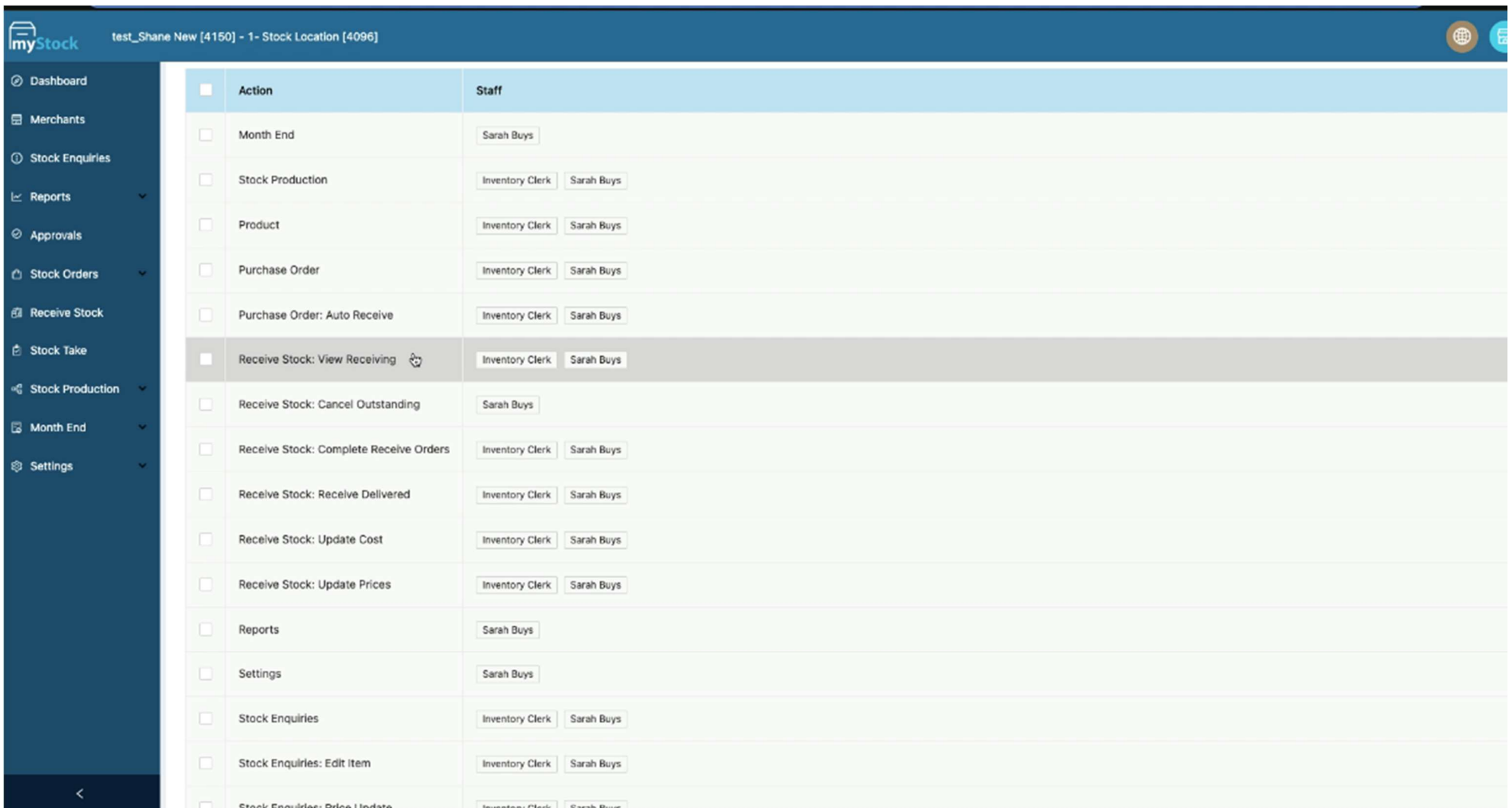
Created	Stock Action	Status	Reference	Created By	Destination	Source	Links
2023-05-30 12:19	Stock Take	Complete	STK-4096-1018	Anna Test	1- Stock Location	1- Stock Location	
2023-05-30 12:23	Stock Take	Complete	STK-4096-1019	Anna Test	1- Stock Location	1- Stock Location	
2023-05-30 12:27	Stock Take	Complete	STK-4096-1020	Anna Test	1- Stock Location	1- Stock Location	
2023-05-30 12:30	Stock Take	Rejected	STK-4096-1021	Anna Test	1- Stock Location	1- Stock Location	
2023-05-31 13:50	Purchase Order (inbound)	Draft	PO-4096-1015	Shane Deane	1- Stock Location	Beer Supplier	

Items: 1 to 5 of 5 1 10 / page

Dashboard
Merchants
Stock Enquiries
Reports
Approvals
Stock Orders
Receive Stock
Stock Take
Stock Production
Month End
Settings
Approvals
Access Control

- Only the owner or inventory admin can edit this section. Select "Access Control".
- The owner or inventory admin can access the "Access Settings" to define the level of access for managers and clerks in myStock.

If you no longer want an inventory clerk to have access to stock production, use the toggle to disable it. When you select any toggle, an "Edit Settings" button will appear at the top right of your screen.



	Action	Staff
<input type="checkbox"/>	Month End	Sarah Buys
<input type="checkbox"/>	Stock Production	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Product	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Purchase Order	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Purchase Order: Auto Receive	Inventory Clerk Sarah Buys
<input checked="" type="checkbox"/>	Receive Stock: View Receiving	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Receive Stock: Cancel Outstanding	Sarah Buys
<input type="checkbox"/>	Receive Stock: Complete Receive Orders	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Receive Stock: Receive Delivered	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Receive Stock: Update Cost	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Receive Stock: Update Prices	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Reports	Sarah Buys
<input type="checkbox"/>	Settings	Sarah Buys
<input type="checkbox"/>	Stock Enquiries	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Stock Enquiries: Edit Item	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Stock Enquiries: Price Update	Inventory Clerk Sarah Buys

To remove an inventory clerk from a selected setting, click on the green tick. It will change to red, indicating that they have been removed from the deselected settings.

myStock test_Shane New [4150] - 1- Stock Location [4096]

Access Settings [+ Edit Settings](#)

<input type="checkbox"/>	Action	Staff
<input type="checkbox"/>	Month End	Sarah Buys
<input checked="" type="checkbox"/>	Stock Production	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Product	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Purchase Order	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Purchase Order: Auto Receive	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Receive Stock: View Receiving	Inventory Clerk Sarah Buys
<input checked="" type="checkbox"/>	Receive Stock: Cancel Outstanding	Sarah Buys
<input checked="" type="checkbox"/>	Receive Stock: Complete Receive Orders	Inventory Clerk Sarah Buys
<input checked="" type="checkbox"/>	Receive Stock: Receive Delivered	Inventory Clerk Sarah Buys
<input checked="" type="checkbox"/>	Receive Stock: Update Cost	Inventory Clerk Sarah Buys
<input checked="" type="checkbox"/>	Receive Stock: Update Prices	Inventory Clerk Sarah Buys
<input type="checkbox"/>	Reports	Sarah Buys

If you want to remove an Inventory Clerk from stock production and I no longer want them to be able to receive anything, select 'Edit Settings" and you will see that their names appear here. The green tick shows what they have access to.

myStock test_Shane New [4150] - 1- Stock Location [4096]

Access Settings

Action	Staff
<input type="checkbox"/> Month End	Sarah Buys
<input checked="" type="checkbox"/> Stock Production	Inventory Clerk Sarah Buys

Edit Access Setting

Name	Action
Inventory Clerk	Can Access
Sarah Buys	<input checked="" type="checkbox"/>

myStock test_Shane New [4150] - 1- Stock Location [4096]

Access Settings


Action	Staff
<input type="checkbox"/> Month End	Sarah Buys
<input checked="" type="checkbox"/> Stock Production	Sarah Buys
<input type="checkbox"/> Product	Inventory Clerk Sarah Buys

Edit Access Setting

Name	Action
Inventory Clerk	<input type="checkbox"/>
Sarah Buys	<input checked="" type="checkbox"/>

Certain sections are restricted for inventory clerks, even if you have selected all actions. For example, inventory clerks do not have access to month-end tasks, cancelling outstanding orders, receiving stock, reports, settings, initial stock takes, and recounting of stock takes, regardless of the selection made.

By following these steps, you can manage user access and settings in myStock. If you have any further questions or need assistance, please don't hesitate to reach out to our support team.



Action	Inventory Clerk	Sarah Buys
<input checked="" type="checkbox"/> Receive Stock: Update Cost	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Receive Stock: Update Prices	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Reports	<input type="button" value="Sarah Buys"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Settings	<input type="button" value="Sarah Buys"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Enquiries	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Enquiries: Edit Item	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Enquiries: Price Update	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Enquiries: Recipe Edit	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Issue	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Requisition	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Take	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Take: Complete Initial	<input type="button" value="Sarah Buys"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Take: Recount	<input type="button" value="Sarah Buys"/>	<input type="button" value="Sarah Buys"/>
<input checked="" type="checkbox"/> Stock Transfer	<input type="button" value="Inventory Clerk"/>	<input type="button" value="Sarah Buys"/>