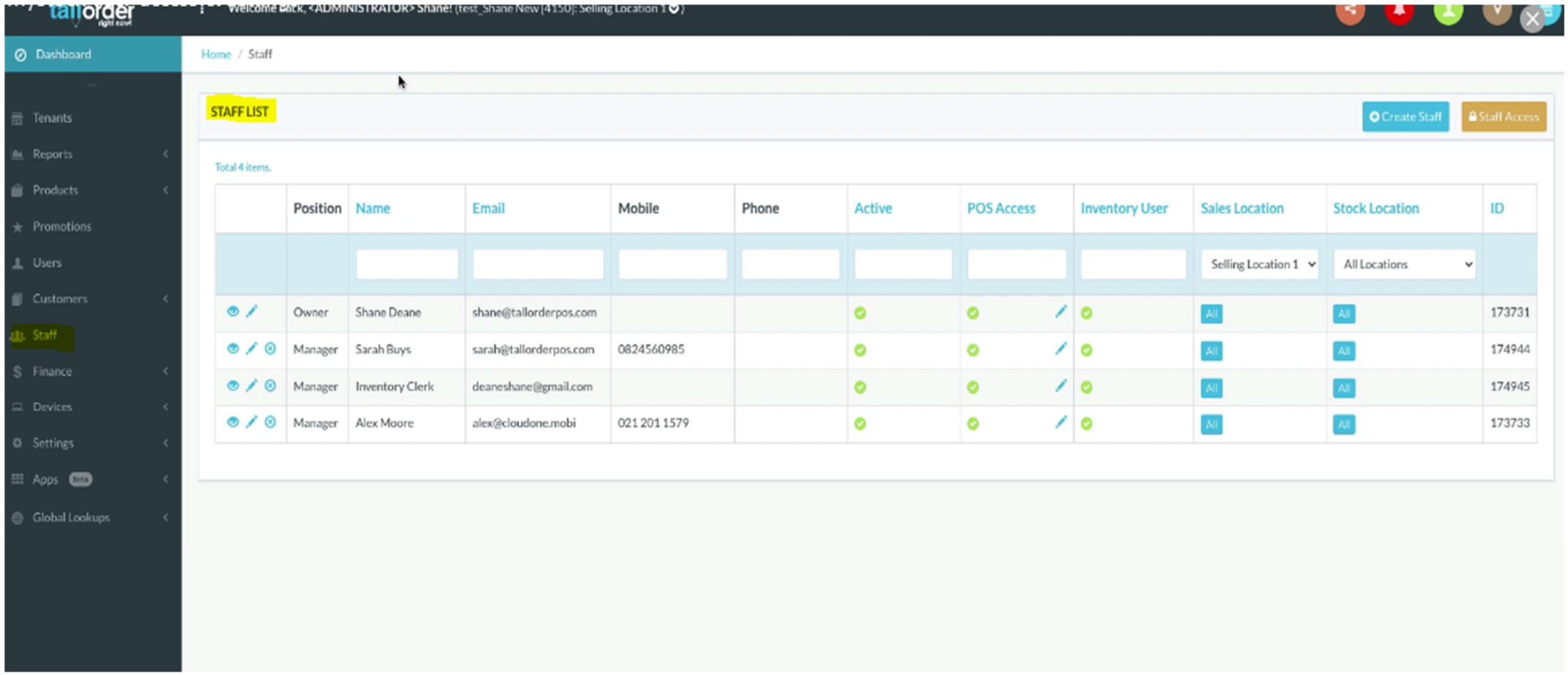
TALLORDER SOLUTIONS

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.



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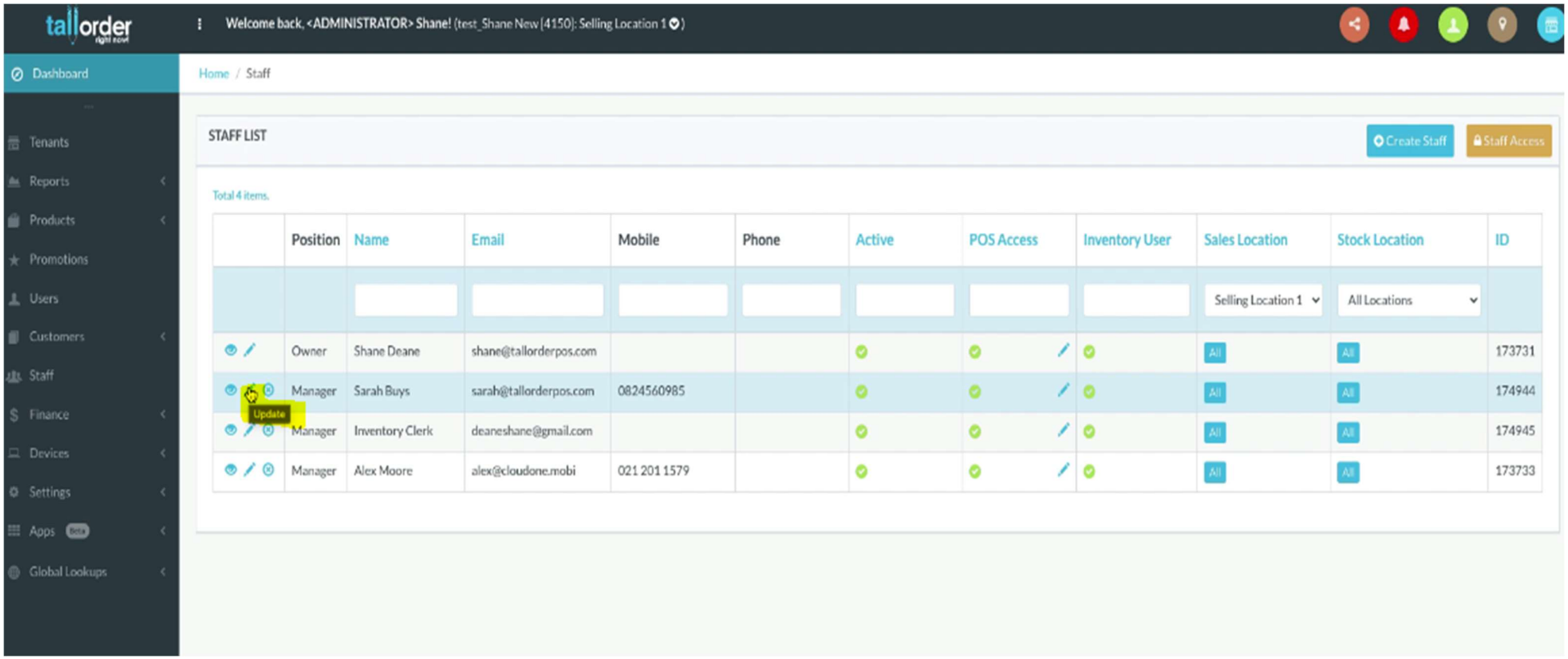
To set up myStock user access, click on the "Update" button for the respective staff member and select "Update User Access".



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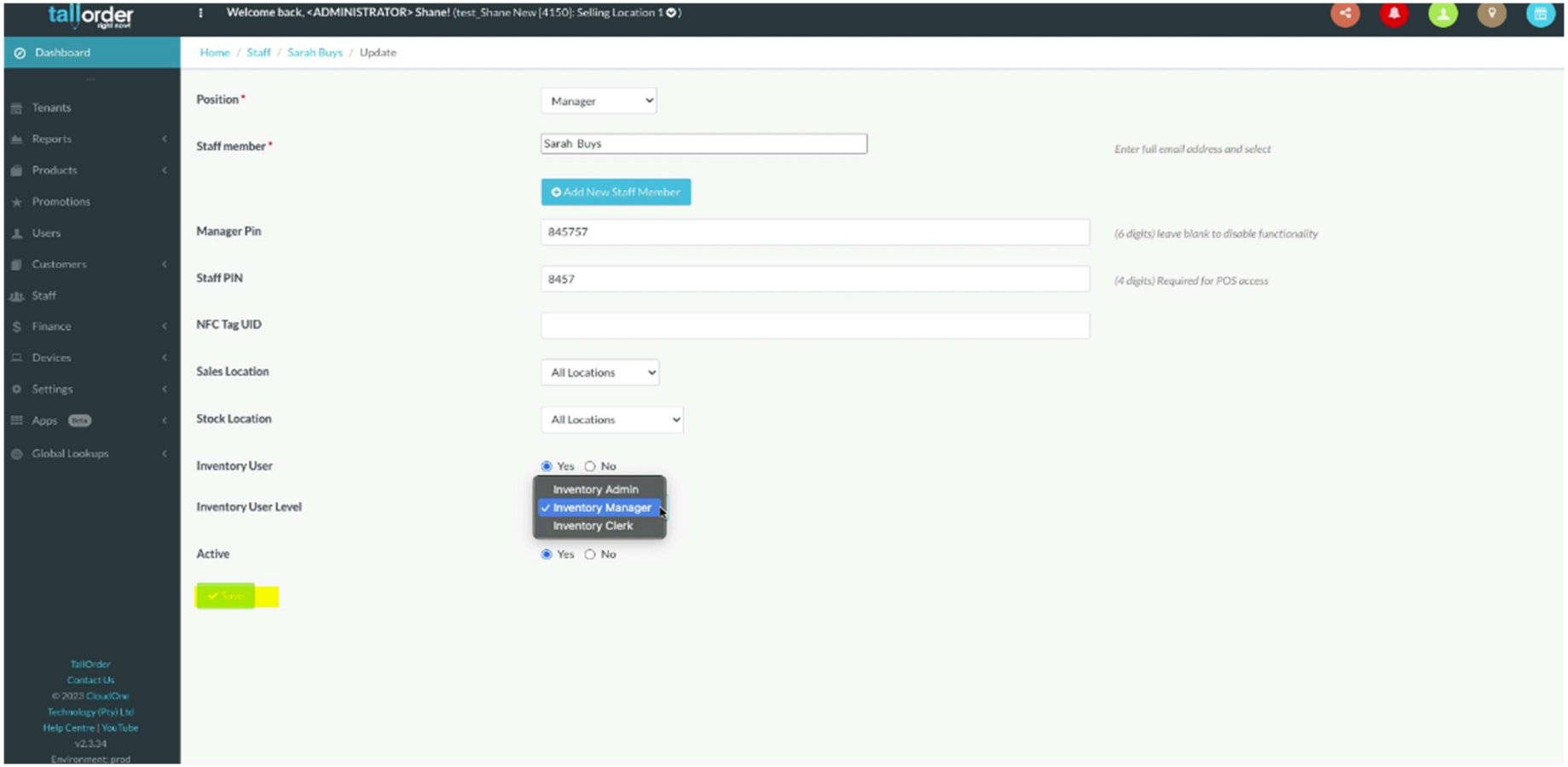
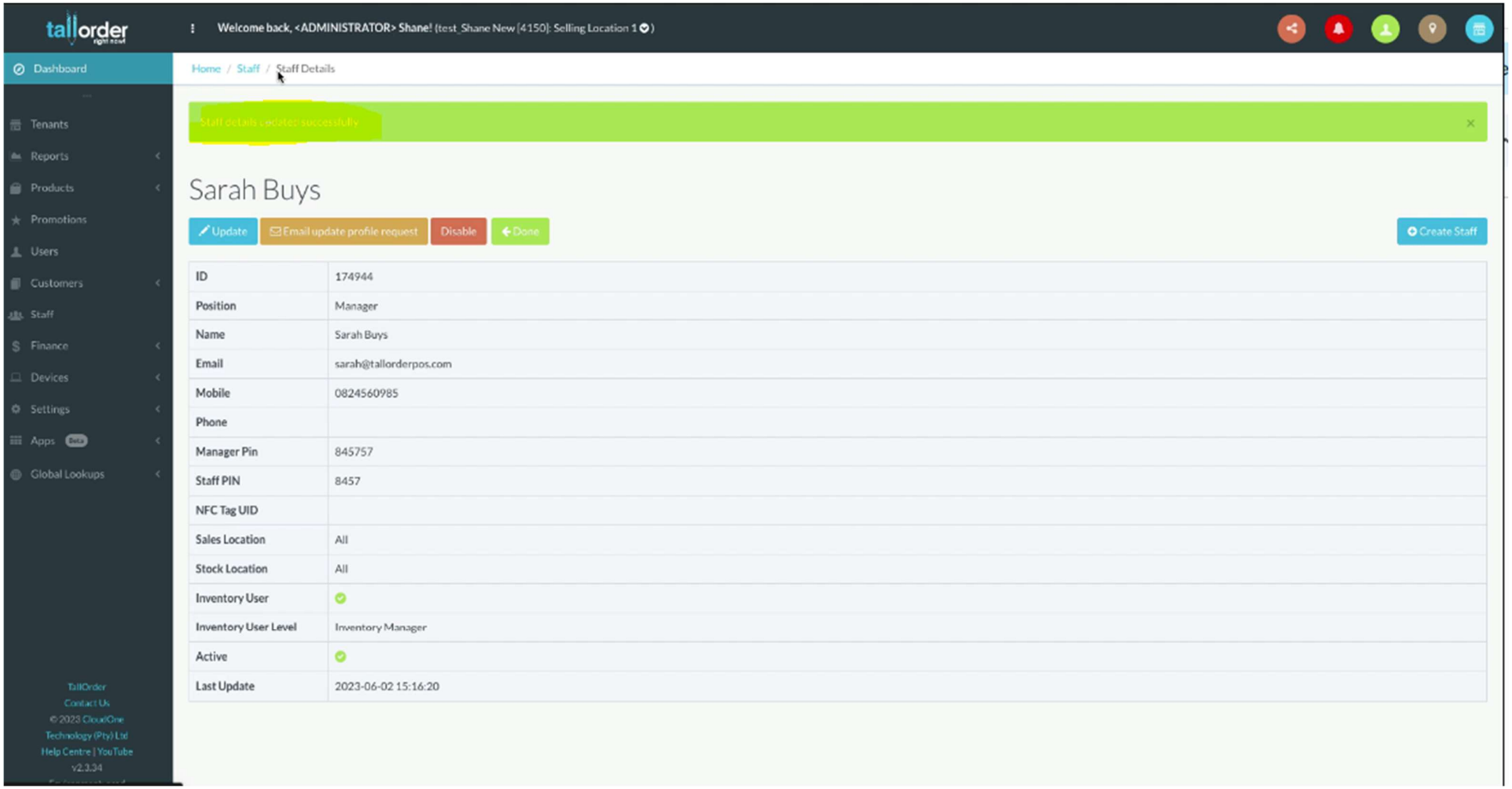
- At the bottom of the screen, you will find the "Inventory User" option.
- Select "Yes" or "No". Choosing "Yes" means that the staff member will be using myStock.
- If you select "Yes", the "Inventory User Level" will appear.
- You can choose from three different user levels: Inventory Admin, Inventory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



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".



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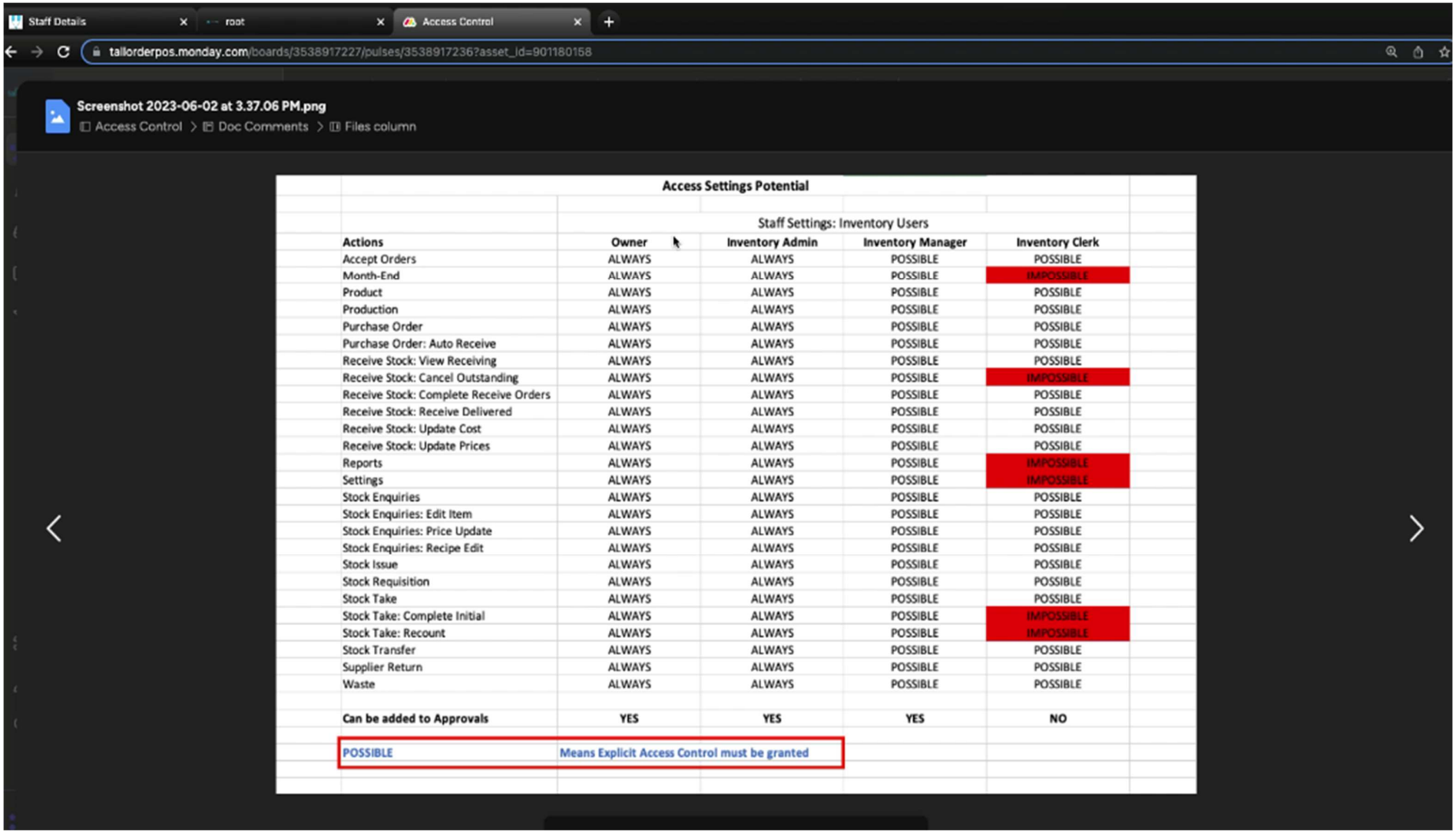
Access Settings Potential



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

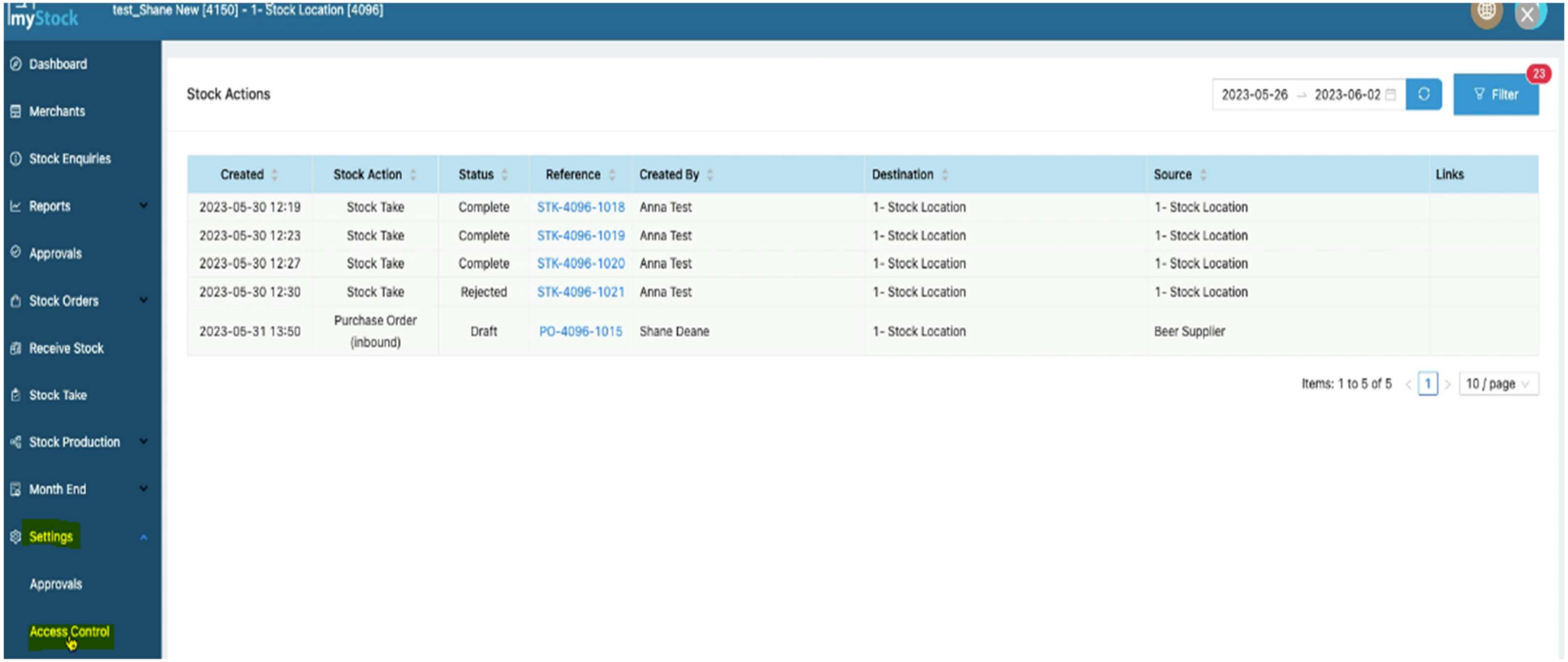
Access Settings Potential:

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.

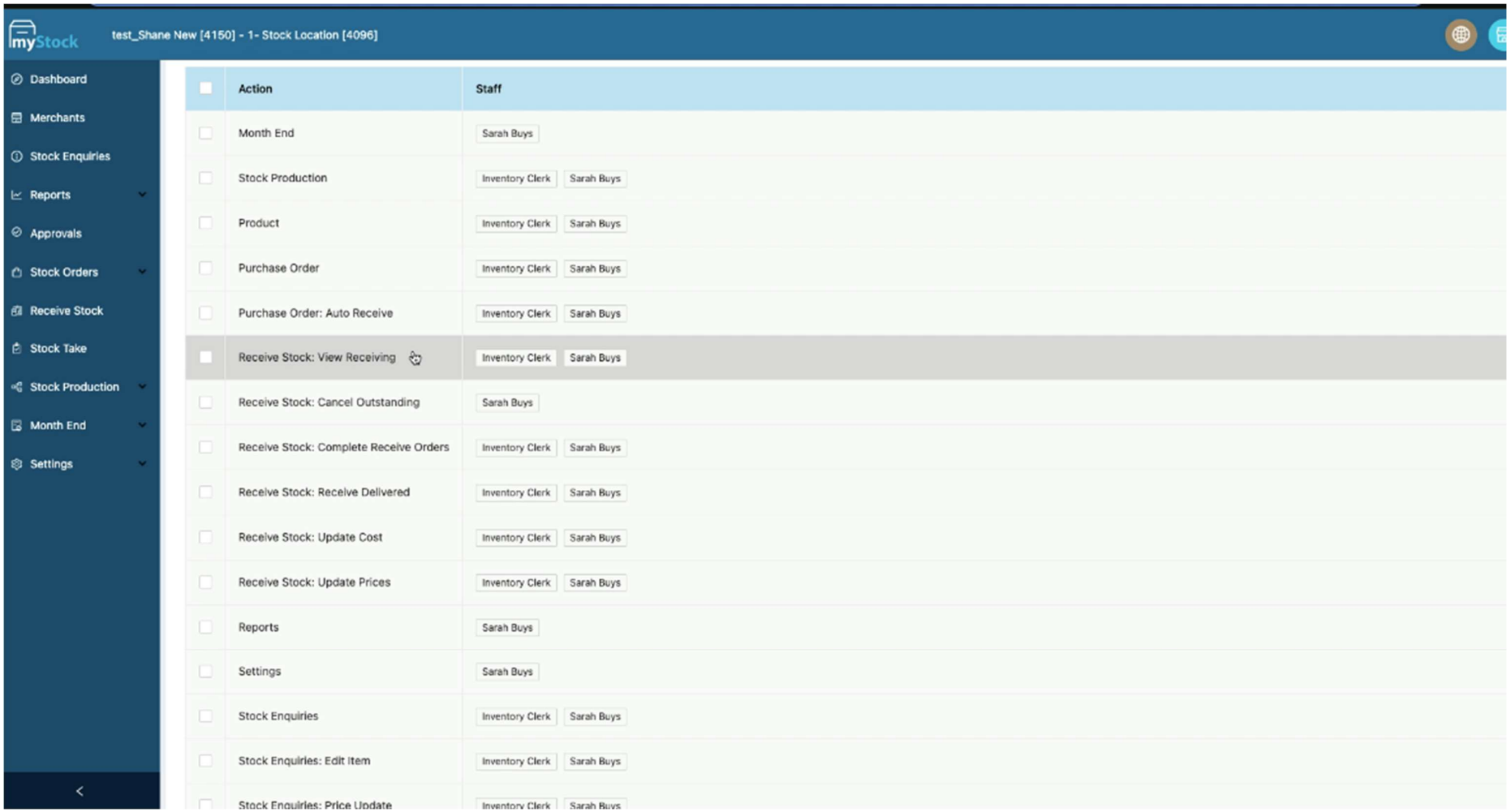
After setting up user levels for all staff members, proceed to sign in.

- 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.

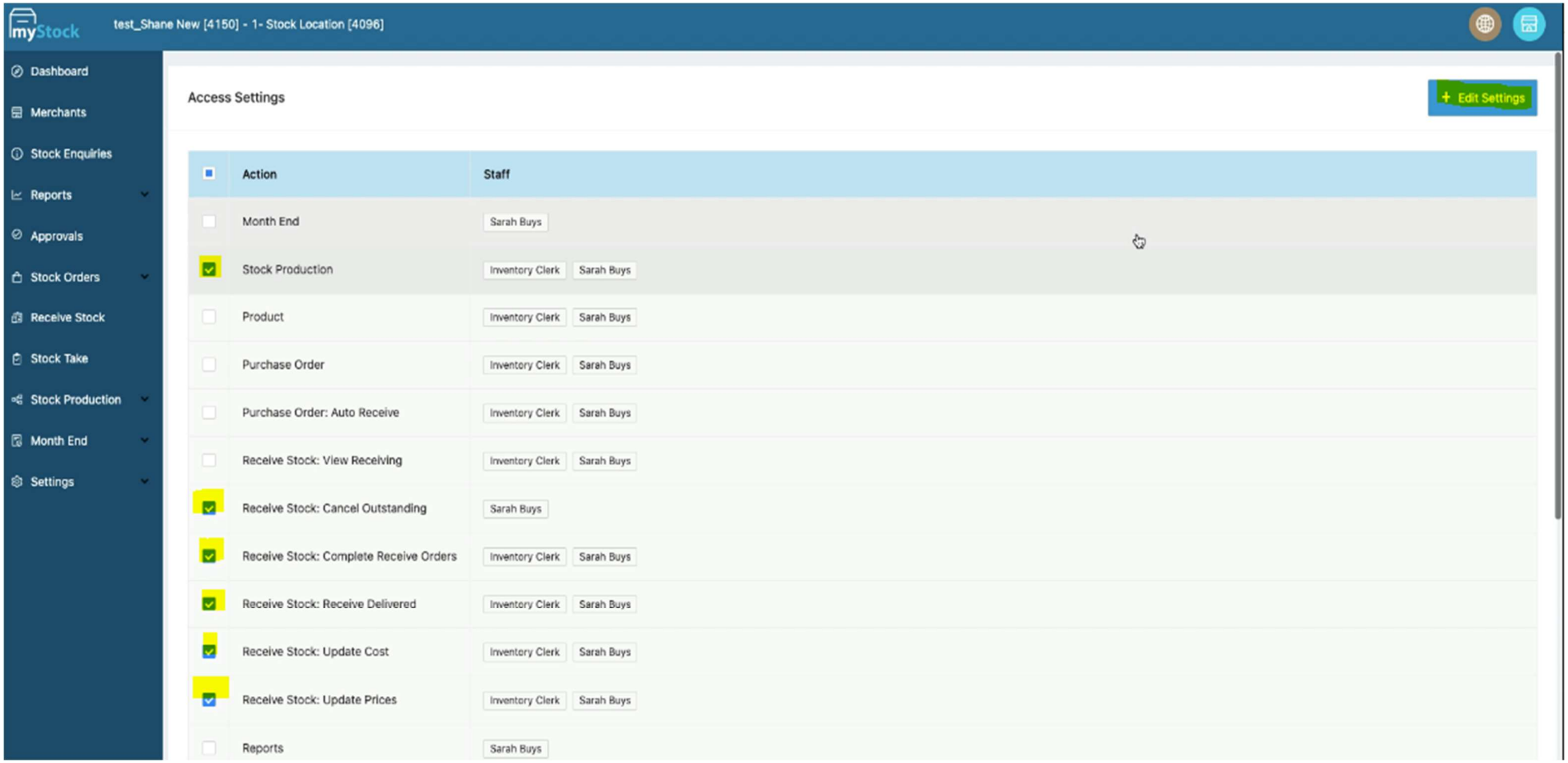


- Only the owner or inventory admin can edit this section. Select "Access Control".
- The owner or inventory admin can access the "Access Settings" to define the level of access for managers and clerks in myStock.

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.



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.



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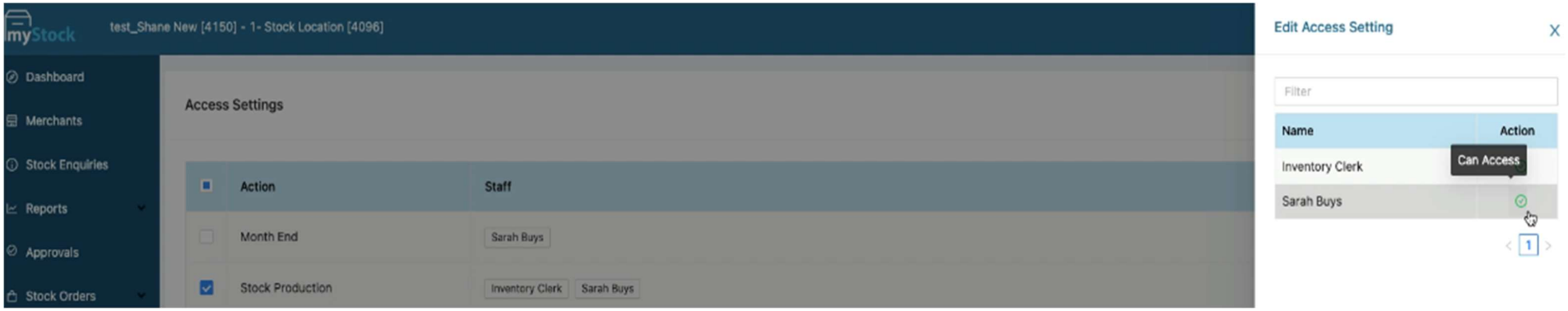
If you want to remove an Inventory Clerk from stock production and I no longer want them to be able to receive anything, select 'Edit Settings" and you will see that their names appear here. The green tick shows what they have access to.



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.