

## Tab Wizard Clerk Setup / Password Management

### Clerk Setup

>**Settings** >**Clerk Setup**: is the process of creating Clerks in the TabWizard system to identify the person performing any operation such as performing a sale, running a report or hitting the No Sale button, etc. The clerks' initials are the identifier. *For example*, if a clerks' initials are "ABC" and that clerk performed a refund, the manager can easily identify the person with initials "ABC" by accessing the Transaction Journal.

There are two Administrator roles within >*Clerk Setup*. These two roles are identical allowing Full Access to all functions of the TabWizard system. These two roles should only be used by the following management:

- **Manager** (MGR): *Owner of business*
- **Leader** (LDR): *Manager or Assistant Manager*

When using a role as *Manager* or *Leader* (MGR or LDR), the user interface of the main screen will display a flashing red/yellow banner across the top as well as a red "Logout" button. It is the MGR or LDR responsibility to always select "**Logout**" before walking away from the computer.

If the MGR or LDR user navigates to Clerk Setup, this role allows the user to Add, Edit, Delete any clerk from the system. If a normal clerk has access to this feature and navigates into the Clerk Setup screen, the clerk will not see the >Fire (Delete) button at the bottom and is limited to what the user can do. You must be logged in as MGR or LDR to perform all functions of Clerk Setup.

## Tab Wizard Clerk Setup / Password Management

### Password Setup

>**Settings** >**Password Setup**: Is the process of setting a “Block” password to not allow clerks to access certain areas of the system. The proper method to set the Password protection of the system is the admin account needs to come up with a unique password. This password will be a “block all” type of password and should never be released to anyone for security reasons. This password should not be the same as clerk or management passwords but a unique password all by itself.

1. If any passwords currently exist, select >**Clear All** >**Yes**
2. Select >**Edit All** and enter a unique password. (*there is no need to write this password down any place*)
3. >**Enter/verify** the password >**OK**
4. Now that all items have a password set, go through the entire list from top to bottom. Select only items of which you would like to allow all clerks to have full access to features (Example: Clerk report, No Sale, Void, etc). Select those items, line by line. Select >**Clear** >**Yes**

### ***Privileged Passwords***

There are times when the manager is going on vacation and needs to allow an elevated clerk to have access to functions that a normal clerk cannot have, but, can also not have access to other management level functions.

To do this, the manager or leader needs to change those lines from the list to a secondary unique password. For example, the manager would normally run a Z report and not allow a clerk to do it but since the manager is away, the elevated clerk would need to perform this action without allowing other clerks access.

1. >**Select an item** from the list, then, >**Edit**
2. >**Enter the current password** (*this is the unique password created prior*)
3. >**Enter a new secondary unique password** to provide the elevated clerk
4. >**Reenter/Verify** the secondary password again >**OK**
5. >**Repeat the process** for all item(s) to allow the elevated clerk to access.
6. >**Accept.**