

User Management

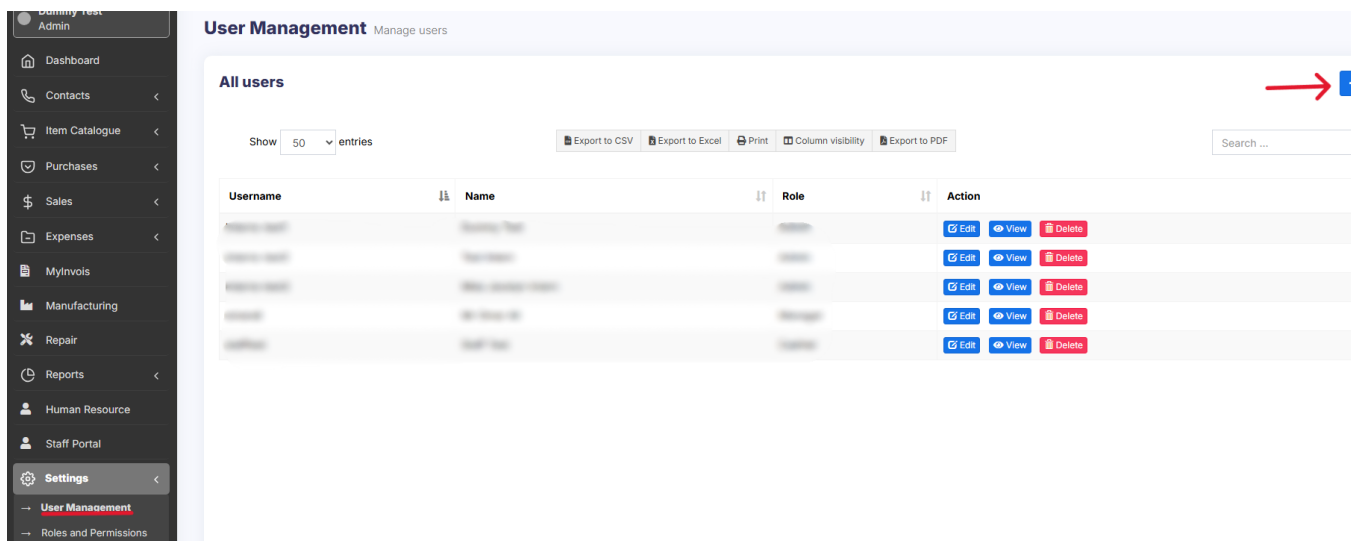
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Adding User & Assigning Location to a User

Adding users

To add a new user , follow the steps given below

1. Go to **User Management -> Users ->Add New**



The screenshot displays the 'User Management' interface. On the left is a dark sidebar with navigation options: Admin, Dashboard, Contacts, Item Catalogue, Purchases, Sales, Expenses, MyInvois, Manufacturing, Repair, Reports, Human Resource, Staff Portal, Settings, **User Management**, and Roles and Permissions. The main content area is titled 'User Management' and 'Manage users'. It shows a table of 'All users' with columns for Username, Name, Role, and Action. The Action column contains 'Edit', 'View', and 'Delete' buttons for each user. Above the table are options to 'Show 50 entries' and buttons for 'Export to CSV', 'Export to Excel', 'Print', 'Column visibility', and 'Export to PDF'. A search bar is on the right. A red arrow points to a blue '+ Add New' button in the top right corner.

2. Fill the user details, select user role, give a unique username.

User

Salutation:
Mr / Mrs / Miss

First Name:*
Staff Test

Last Name:
Last Name

Identity Card No.:
Identity Card No.

Email:*
staff@gmail.com

Is active ? ⓘ

Enable service staff pin ⓘ

Roles and Permissions

Allow login

Password:
Password

Leave password field blank if you don't want to update password

Confirm Password:
Confirm Password

Role: ⓘ
Cashier

Access locations ⓘ

All Locations ⓘ

Interns Test (BL0001)

Kiosk Makanan (SMKPU)

More Informations

Date of Birth:
Date of Birth

Gender:
Please Select

Marital Status:
Marital Status

Blood Group:
Blood Group

Mobile Number:
Mobile Number

Alternate Contact Number:
Alternate Contact Number

Sales Commission

Sales Commission Percentage (%): ⓘ
20.00

Max sales discount percent: ⓘ
10.00

Allow Selected Contacts ⓘ

3. **Sales Commission Percentage (%):** Provide the commission % for this user. This option gets applied if the commission agent feature is enabled. *(Not available in Senangurus-Enterprise)*

Sales Commission

Sales Commission Percentage (%): ⓘ
Sales Commission Percentage (%)

Max sales discount percent: ⓘ
Max sales discount percent

Allow Selected Contacts ⓘ

4. **Is active?:** Activate/Deactivate the user.

Is active ? ⓘ

5. You can **Edit/Delete** a user.


Username	Name	Role	Action
interns-test1	Training Test	Admin	Edit View Delete
interns-test2	Test Interns	Admin	Edit View Delete
interns-test3	Miss. Javanese Interns	Admin	Edit View Delete
manager	MR. Group 01	Manager	Edit View Delete
staff-test	Staff Test	Cashier	Edit View Delete

Assign locations

While adding the user, select the locations that the user can access. You can either select all locations or select one or more particular locations.

Refer to the image below:

Access locations

- All Locations 
- Interns Test (BL0001)
- Kiosk Makanan (SMKPU)

Max sales discount

Max sales discount percent:

The maximum discount that an user can give during sales in the POS & sales screen. If you don't want to have this restriction then simply keep this value blank.

Disable login

You can provide login permission for an user or deny it. If you allow user to login, then you have to provide the username and password for that user.

Refer to the image below

Roles and Permissions

- Allow login

Video Demonstration:

<https://www.youtube.com/embed/qXYdwaiv5FQ>

Role Management

Adding Roles

1. Every new business comes with some default roles – **Admin & Cashier**.

Roles and Permissions Manage Roles and Permissions

All roles +

Show entries Search ...

Roles and Permissions	Action
Admin	
Cashier	Edit Delete
Executive Manager	Edit Delete
Manager	Edit Delete
Service Staff	Edit Delete

Admin have all permissions in the application.

Cashier have permission to only POS section.

2. You can create a role by clicking on **Add** button -> Giving a **Role Name** and then selecting the appropriate permission for that role.

+ Add → **Add Role**

Role Name:*

Permissions:

Contact

[Supplier](#) [Customer](#)

Product

[Product](#) [Brand](#)


[Unit](#) [Category](#)

Purchases


[Purchase & Stock Adjustment](#)

3. Sometime you may need to give a user access to a/some particular location(s) only. In this case, select the locations from **Access locations** permission. Select **All Locations** to give permission to access all locations for your business.

Access locations 

- All Locations 
- Interns Test (BL0001)
- Kiosk Makanan (SMKPU)

4. Roles permissions can be **Edited** & **Deleted**.

Roles and Permissions 	Action
Admin	
Cashier	 Edit  De
Executive Manager	 Edit  De
Manager	 Edit  De
Service Staff	 Edit  De

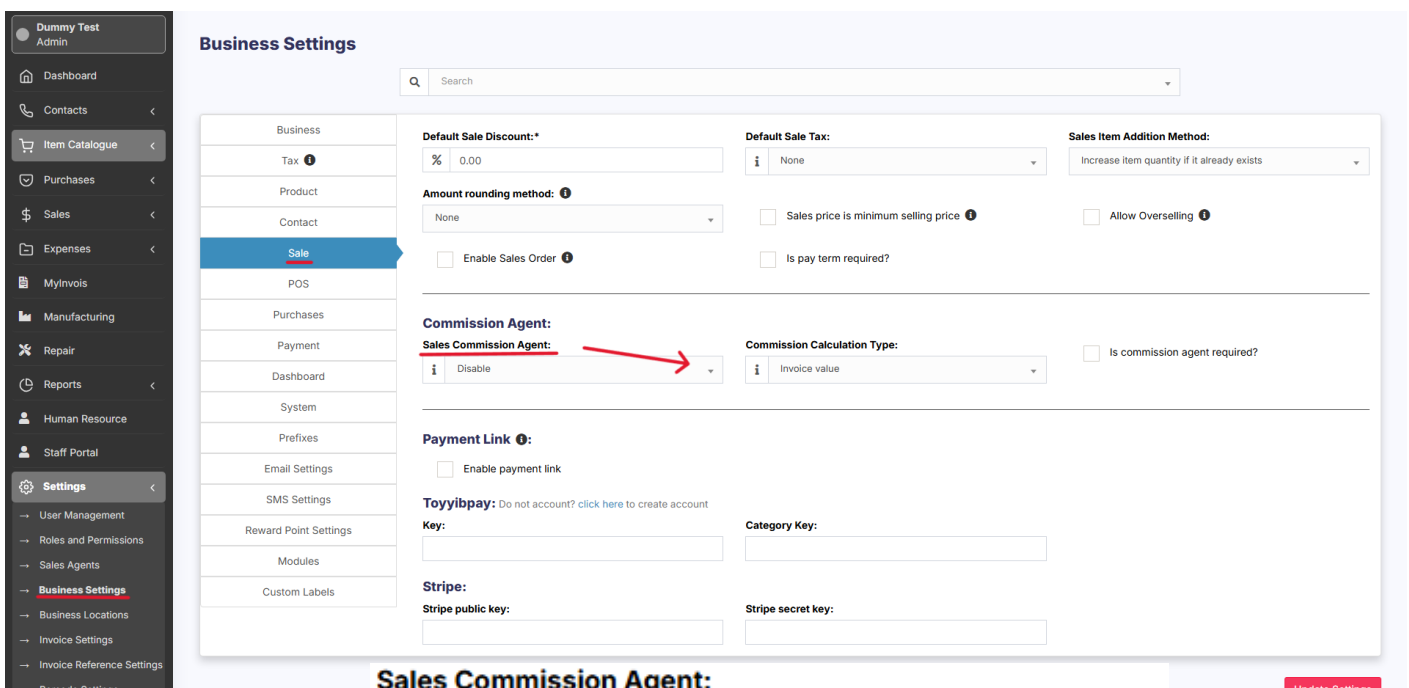
You must update the role of an existing user before deleting a role.

Using Commission Agent feature

Commission Agent is useful for many businesses. Businesses pay sales agent/commission agent commission on every sale they bring.

Enabling & Choosing Commission Agent Type:

By default Commission Agent is Disabled. You can enable it from **Settings -> Business Settings -> Sale -> Sales Commission Agent drop-down**.



The screenshot shows the 'Business Settings' interface with the 'Sale' tab selected. Under the 'Commission Agent' section, the 'Sales Commission Agent' dropdown is set to 'Disable'. A red arrow points to this dropdown. Below it, the 'Commission Calculation Type' is set to 'Invoice value'. There is also a checkbox for 'Is commission agent required?' which is currently unchecked. Other settings like 'Default Sale Discount', 'Default Sale Tax', and 'Sales Item Addition Method' are also visible.

Sales Commission Agent:

- Disable
- Disable
- Logged in user
- Select from user's list
- Select from commission agent's list

You will see 3 different types:

1. **Logged in User:** If this option is used then the Logged in User will be automatically considered as the commission agent for the sales added by him. Meaning the user adding the sales will get the commission for the sales.

2. **Select from User's List:** If this option is enabled then in POS & Sales Screen you will see the list of “**users**” present in your business. The user adding the sales will select the commission agent from the list of users displayed.
3. **Select from Commission Agent List:** If this option is enabled then in POS & Sales Screen you will see the list of “**Sales Commission Agents**” present in your business. The user adding the sales will select the commission agent from the list of “Sales Commission Agents” displayed.

Select the option as per your business requirements.

Adding Commission Percentage:

Commission Agent:

Sales Commission Agent:

i	Disable	▼
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You can add commission % while adding/editing the **User** or **Sales Commission Agent**

Commission Calculation Type:

The commission for a user can be calculated based on two methods

1. Invoice value:

Commission Calculation Type:

i	Invoice value	▼
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With this method, commissions are calculated based on the total invoice amount generated by the agent. For instance, if an agent's monthly invoice amount totals \$5000 and the commission percentage is set at 10%, the user will receive \$500 as commission.

2. Payment Received:

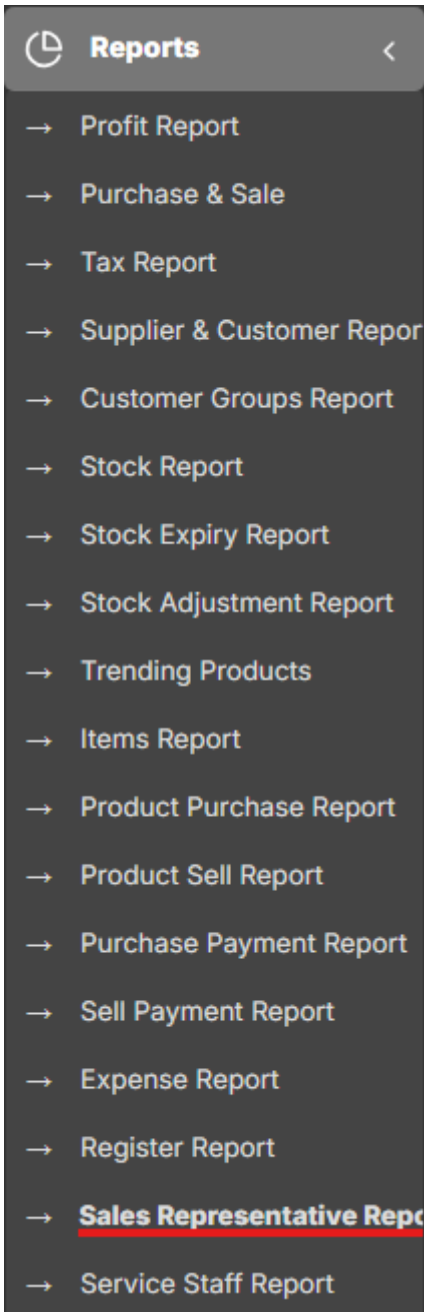
Commission Calculation Type:

i	Payment Received	▼
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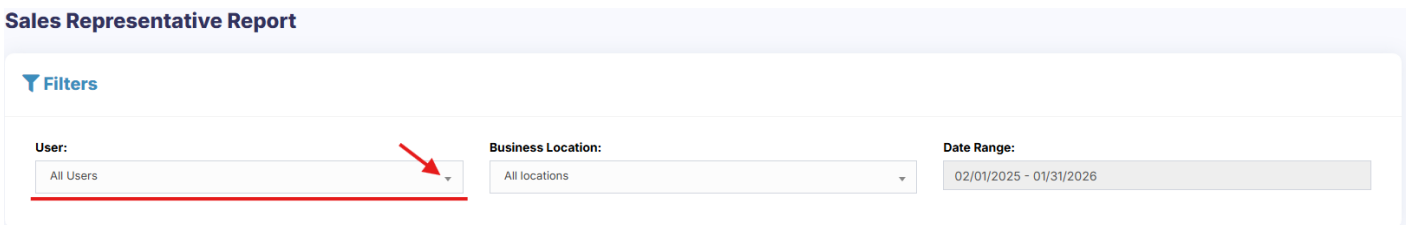
Alternatively, commissions can be calculated based on the actual payments received.
For instance: if the agent's monthly invoice amount is \$5000 with a 10% commission rate, but only \$2000 is received within the month, the user will receive \$200 as commission. If the remaining \$3000 is received in the following month, the user will receive an additional \$300 as commission.

Calculating Commission Amount:

To See the commission amount, Go to **Reports -> Sales Representative Report**.



Select the User for which you want to see the commission amount.



On selecting it will show you the detailed summary of Total Sale, Total Sale Commission & Total Expense. Also, the table below lists all the transactions.

Summary

Total Sale - Total Sales Return: RM 2,475.00 - RM 0.00 = RM 2,475.00

Total Sale Commission: RM 0.00

Total Expense: RM 100.00

⚙ Sales Added ⚙ Sales With Commission ⚙ Expenses

Show 50 entries

📄 Export to CSV 📄 Export to Excel 🖨 Print 📄 Column visibility 📄 Export to PDF

Search ...

Invoice No.	Customer name	Payment status	Total amount	Total paid	Total remaining
0012	Walk-In Customer	Paid	RM 500.00	RM 500.00	RM 0.00
0010	Mr Joseph 920815-03-2380	Paid	RM 225.00	RM 225.00	RM 0.00
0008	Walk-In Customer	Paid	RM 250.00	RM 250.00	RM 0.00
0007	Walk-In Customer	Paid	RM 750.00	RM 750.00	RM 0.00
0002	Walk-In Customer	Paid	RM 250.00	RM 250.00	RM 0.00
0003	Walk-In Customer	Paid	RM 250.00	RM 250.00	RM 0.00
0001	Walk-In Customer	Paid	RM 250.00	RM 250.00	RM 0.00
		Paid - 7	RM 2,475.00	RM 2,475.00	
Total:		Paid - 7	RM 2,475.00	RM 2,475.00	Sell Due - RM 0.00 Sell Return Due - RM 0.00

Showing 1 to 7 of 7 entries

Previous 1 Next

Sales commission is calculated without shipping or tax. Sales commissions are from the sales of the items, not the overhead cost such as taxes, freight, shipping, handling, etc.

Commission payment:

After getting the commission amount, **SenangUrus ERP** have 2 ways to make payment for the commission.

Using expense

- Calculate the commission from the sales representative report and after paying the amount add it as an expense in Add Expense menu.
- In Add expense, select the Expense-For dropdown

Using HRM module

- Use the HRM module.
- In the HR module, when creating payroll for a user, it will automatically include the sales commission.
- Sales commission will be shown as Payroll-Components so that the business owner and the user both know details of the commission.

Adding superadmin user

Creating Superadmin user:

1. Login to the server from Cpanel or DirectAdmin or Plesk or Filezilla (FTP) or similar panels.
2. Open **.env** file with the file editor. **.env** file is present inside the UltimatePOS directory
3. Inside the env file, you will find "**ADMINISTRATOR_USERNAMES**" configuration. Add the username of the user which you want to make as superadmin.

Example if you want "user1" to be superadmin then add it like below:

ADMINISTRATOR_USERNAMES="user1"

NOTE: user1 mentioned here is for example only and the username is case sensitive.

4. You have to add an already existing/signed up username here. To add multiple users as superadmin you can add them comma separated.

ADMINISTRATOR_USERNAMES="user1,user2,user3"

NOTE: If super admin user is added, that user can

- Access modules tab in side menubar
- Can enable backup – [To enable backup using superadmin user](#)