

Security Overview

Proper security prevents unauthorized access to transaction and customer data.

Let's discuss the importance of users and an assigned password or PIN.

Users have one or more role associated with them and that determines their permission settings.

There are also some system wide settings that affect access along with the enabled licenses.

Objectives

- Users, Passwords, and PINs
- Roles and Permissions
- Settings and Licenses

Users, Passwords, and PINs

When you log into just about any software you have a username and most likely, a password.

Managing users lets you control who can access your software and what they can do once they have logged in.

Basic contact information is gathered and easily updated.

Strong passwords are not only smart, but a requirement when adding new users.

PIN numbers can be created for Point-of-Sale log in.

Each user has a status and is identified as someone that can update other user records or has access to all administrative functions.

These toggles represent some important decisions so be sure you identify who in your business will have this functionality.

Finally, the user record contains the list of assigned licenses and assigned roles.

We will explore those concepts next.

Roles and Permissions

You can think of a role kind of like a job description.

For example, a clerk could be a role and that role performs certain functions at point of sale.

The permissions enabled for that role determine what the cashier can and cannot do.

Permissions are either allowed or not allowed.

When assigning a role to the user – the user inherits all the rules associated with that role.

So, the user is then allowed or not allowed to perform certain functions.

Settings and Licenses

In addition to users and roles, settings and licenses determine your software behavior.

Settings are associated with applications.

The value field can affect process workflows, costing methods or even naming conventions.

Licenses are enabled based on your sales agreement.

There are a defined number available and assigned.

Those licenses are assigned to the user and again, determine what that person can and cannot do.

Recap

Users, permissions, roles, settings, and license all play a part in developing a solid security structure.

Passwords and PIN numbers help secure your data.

Defined roles make sure everyone has access to the applications they need.

And settings and licenses determine how you do business.

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Corporate Office

804 Las Cimas Parkway
Austin, TX 78746

USA

Toll Free: +1.888.448.2636

Direct: +1.512.328.2300

Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104

Plaza Central, Col. Santa Maria

Monterrey, Nuevo Leon, CP 64650

Mexico

Phone: +52.81.1551.7100

Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena

Downshire Way

Bracknell, Berkshire RG12 1PU

United Kingdom

Phone: +44.1344.468468

Fax: +44.1344.468010

Asia

238A Thomson Road #23-06

Novena Square Tower A

Singapore 307684

Singapore

Phone: +65.6333.8121

Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,

100 Pacific Highway

North Sydney, NSW 2060

Australia

Phone: +61.2.9927.6200

Fax: +61.2.9927.6298