

Setting Up Manager Overrides and Alerts

Override permissions enable managers to approve or deny certain point of sale actions.

For example, a point-of-sale clerk may not have permission to change the price of an already-discounted item.

Therefore, the transaction requires a manager to override the price so the clerk can complete the sale.

Propello gives you options to alert managers when a situation requires action.

This course shows how to set up manager overrides and configure alerts to handle them effectively.

Objectives

- Setting Up Manager Overrides
- Setting Up Manager Override Alerts

Setting Up Manager Overrides

The first step when setting up manager overrides is to configure permissions.

From the main screen, select the Admin icon and then choose Manage Roles.

Choose the role that will have the manager override permission.

More than one role can have it, but you can select only one role at a time.

Select Edit.

In the Filter By Authorization section, select the All tab.

In the Permissions field, type the word override.

Scroll through the list and select all the override permissions required for this role.

In the Permissions field, type the phrase Access Alerts.

Make sure that the Access Alerts permission is enabled.

Users need this permission to receive manager override notifications.

Select Save.

Setting Up Manager Override Alerts

With manager override permissions configured, you can move on to setting up alerts.

Alerts ensure that the application delivers critical information to the appropriate manager or role promptly.

The first step is to make sure that appropriate staff can access alerts.

Open Manage Roles, select a role or roles you want to access alerts and then choose Edit.

Enable the Access Alerts check box.

Select your username on the top right corner of the screen, then choose Manage Profile.

Select the Alerts tab.

Use Search or scroll to find the alert you want.

Enable the checkboxes for the alerts you want managers to receive and how; by email, SMS, or both.

Note: You must have a mobile number on the user record to receive SMS alerts.

Alerts received by email are information only. You cannot perform an override via email.

If you have override permission for receiving SMS alerts, you may perform the override by responding to the message.

When finished, choose Save.

Recap

This course showed how to set up manager overrides and configure alerts so that managers can respond to them quickly.

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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