

Using Manager Overrides and Alerts

Manager overrides occur when a POS clerk or an employee tries to perform a restricted function.

A manager responds to the override to either approve or decline that function.

In this course, we'll demonstrate how to perform manager overrides at point of sale and via text or email.

We'll also use the Alerts Viewer to perform manager overrides.

Objectives

- Manager Override in POS
- Text and Email Overrides
- Using the Alerts Viewer

Manager Override in POS

Administrators can prevent users from performing certain actions such as returns with no receipt or voiding a sale.

In these situations, a manager can perform an override for the transaction to continue.

When a clerk performs a restricted action in POS, in this case, changing an item price, an **Override Required** dialog box appears.

If you *haven't* set up PIN overrides yet, *this* dialog box appears requesting login credentials.

You can enable PIN overrides in **Settings and Licenses** for easier approvals.

Now, the **Override Required** dialog box displays two options, *Use my login* and *Use my PIN*.

Select *Use my login* to perform a manual override by entering the manager's username and password.

Click **OK**.

Select *Use my PIN* to quickly approve the action and click *OK*.

Now, the POS clerk can complete the transaction.

Text and Manager Overrides

You can opt to get override notifications by email, text, or both in the **Alerts** tab in **Edit Profile**.

You cannot *perform* manager overrides via email. You only receive an email containing details of the override function. You'll have to log in to your account to approve or decline the action.

If you've opted for SMS alerts, you will receive a text with response instructions and the action can be approved or declined.

Reply 1 to approve or 2 to decline.

When approved, the POS clerk can click **OK** and continue the transaction.

If declined, the POS clerk receives a decline message with the next possible options.

Manager overrides via text can be performed even outside the store when you are offsite.

Using the Alerts Viewer

You can view alerts and override requests in the **Alerts Viewer** page.

Click the **Alerts** icon in the homepage.

Click the **Alert** drop-down menu and select **Manager Override**.

Use the other drop-down menus to filter your results and click **Search**.

Tap anywhere on the override alert to view the details.

You can use the **Action** column to perform an approval or declination.

The **View Alert Details** pop-up appears when you click the alert.

Choose to approve or decline the override action.

Use the **Response Reason** field to state a reason.

Note that once you've responded to the alert, it automatically disappears.

Recap

Manager overrides are essential to enforce security settings while keeping customers moving through checkout.

In this course, we explored performing manager overrides in POS and via email or text.

Remember, manager overrides can be performed via text, but not email.

We also used the **Alerts Viewer** to perform overrides.

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