How to Create Cash Register Sessions for your employee to manage their shift?

Cash Register Session Manager allows us to create Login sessions for the employees. Once a session is created the employee will be able to login only once into the application for that session. A Session will end once the employee closes the application (system timeout will not be taken as session end/ logout).

To create a Cash Register Session for an employee you would need to

Step 1: Create employee with username and password and '**Cannot login without administrative permission** ' option selected.

Step 2: Assign a Cash register to Employee.

Step 3: Create a session for the employee.

Step 4: How to login to a session.

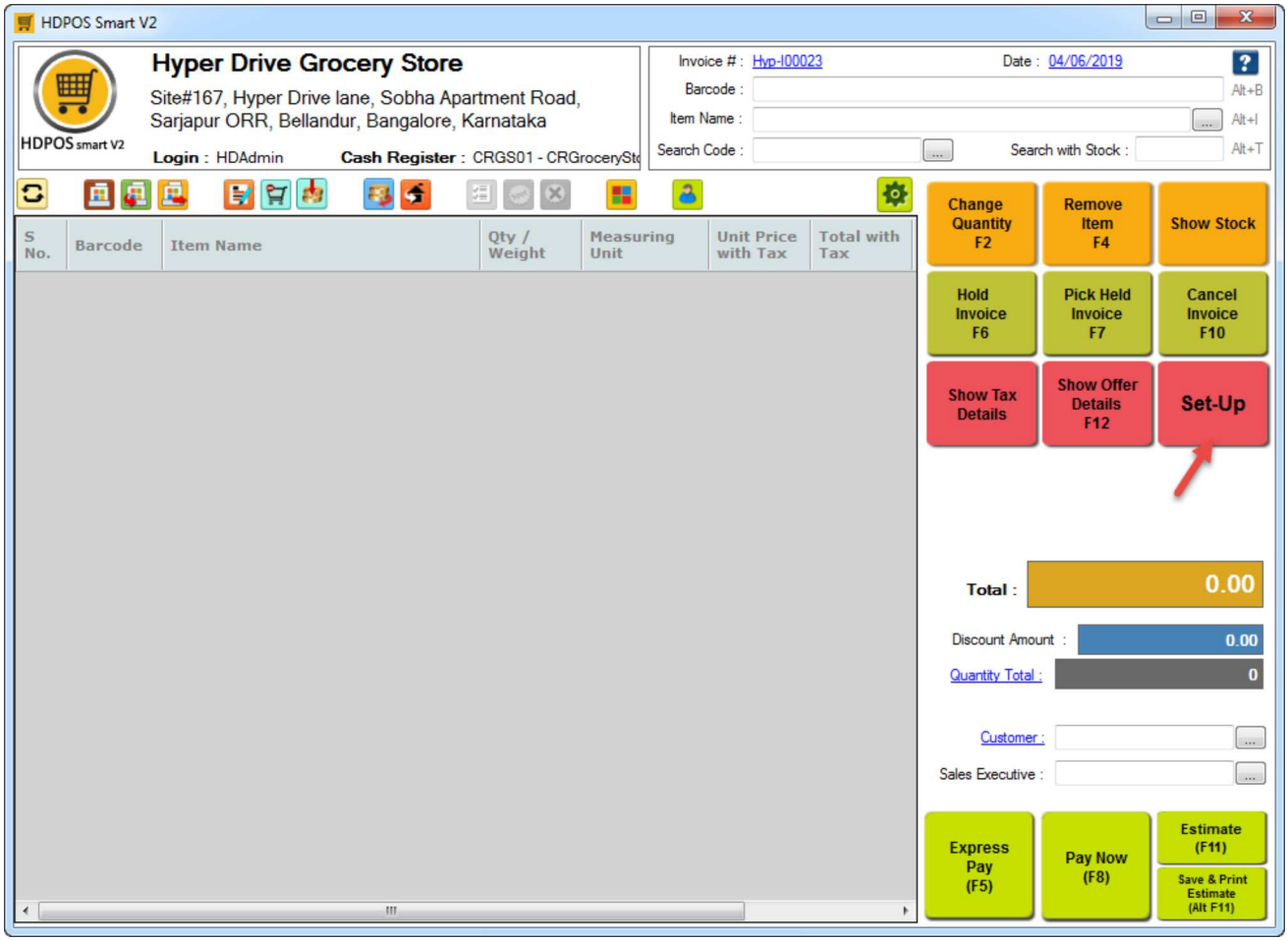
Step 5: How to close a session.

Sessions are generally required when you have employees working on shifts and want to track the transactions done during their login. It also helps in handing over & tallying the cash before the new employee logs in.

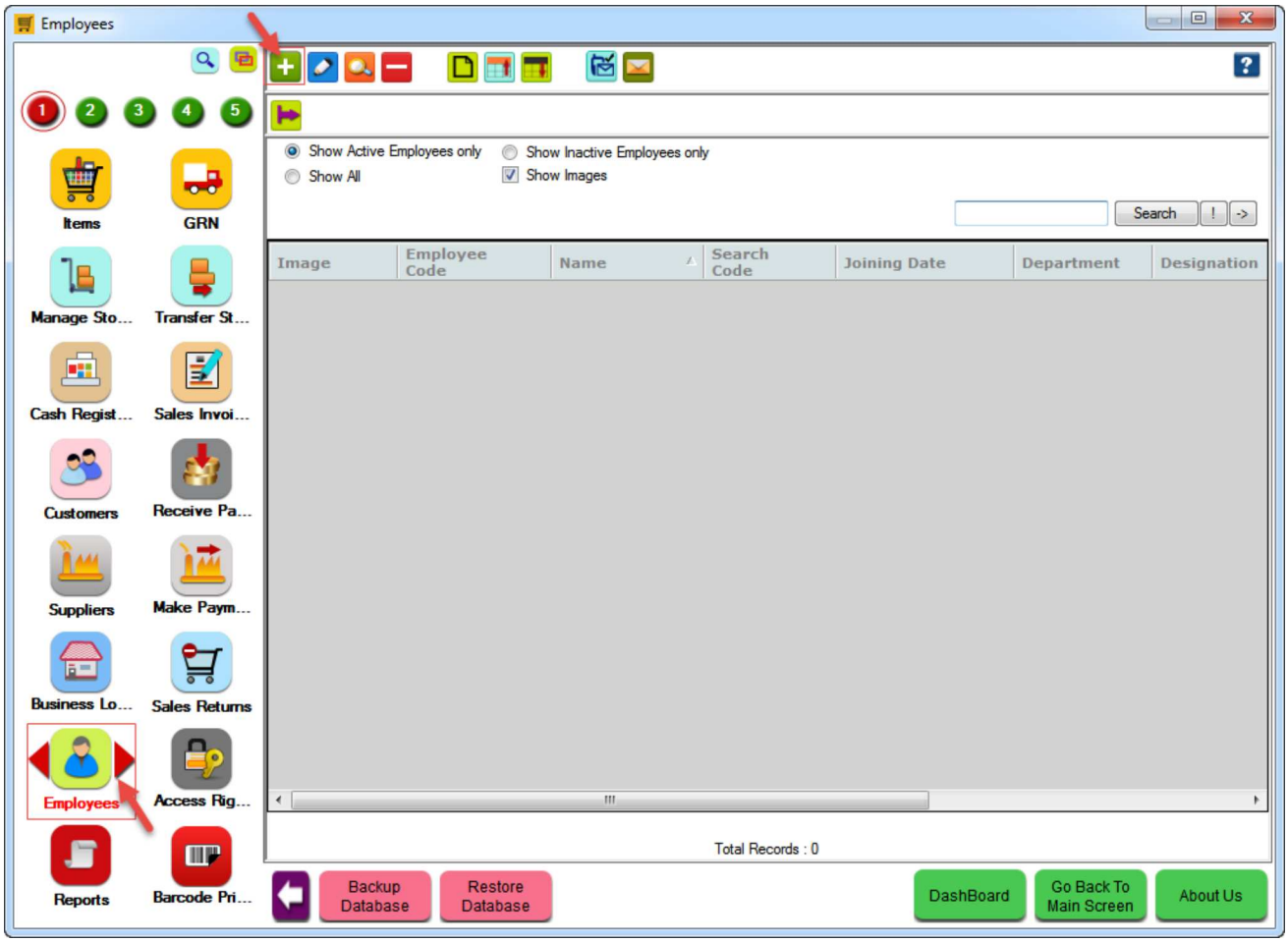
Let's look at each of the steps in detail.

Step 1: Create employee with **username and password** and '**Cannot login without administrative permission** ' option selected:

1. Run **HDPOS smart**. From main screen, click on **Set-Up.**

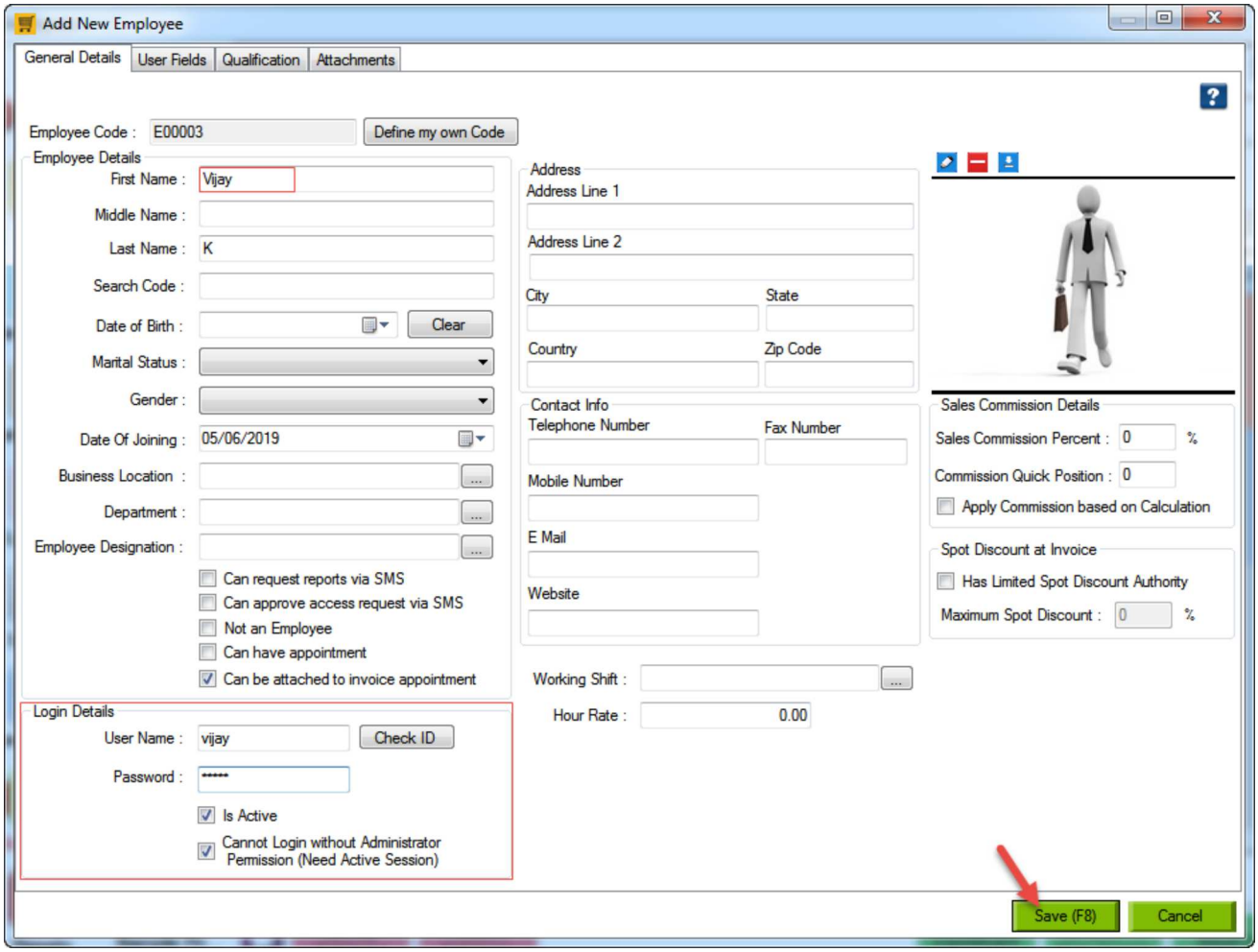


2. From 1st page, click on **Employee**. From **Manage Employee** screen, click on **Add Employee** button.



3. In the **Add New employee** screen, enter the required details.

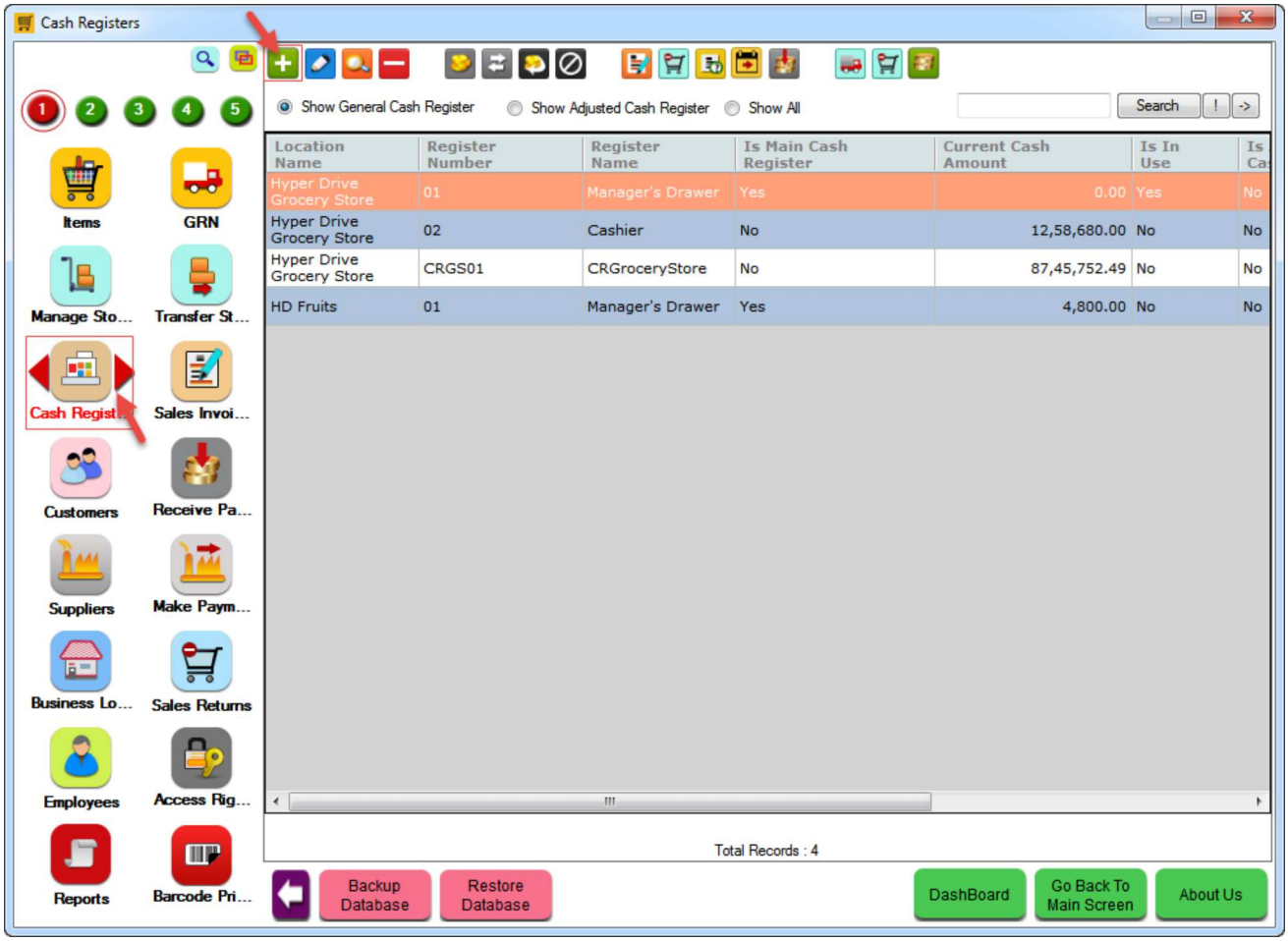
a. Under **Login Details** section, enter details for **User Name** and **Password**. b. Select checkbox '**Cannot login without Administrator permission**' . c. Click on **Save**.



Step 2: Assign a Cash register to Employee**:**

1. From the **1st page** of **Setup**, click on **Cash Register**.

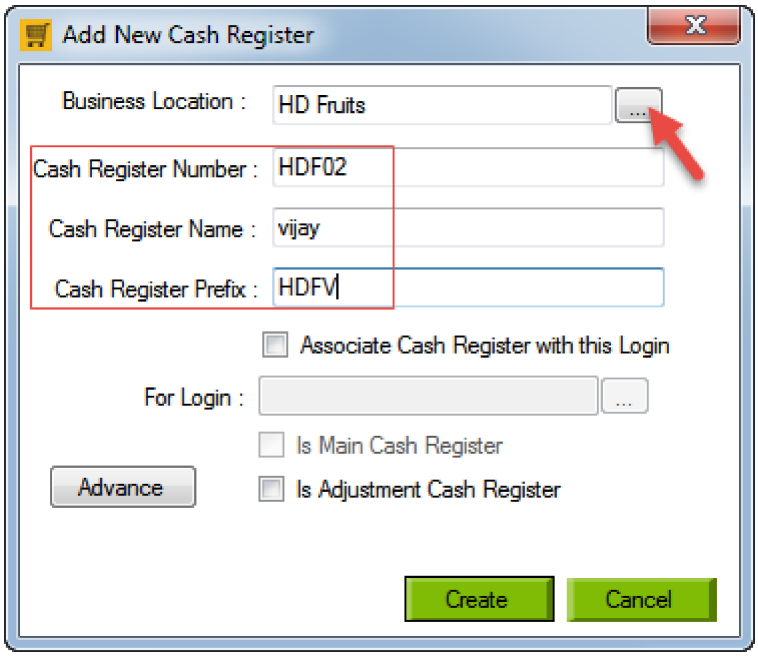
2. From **Manage Cash Register** screen, click on **Add Cash Register** button.



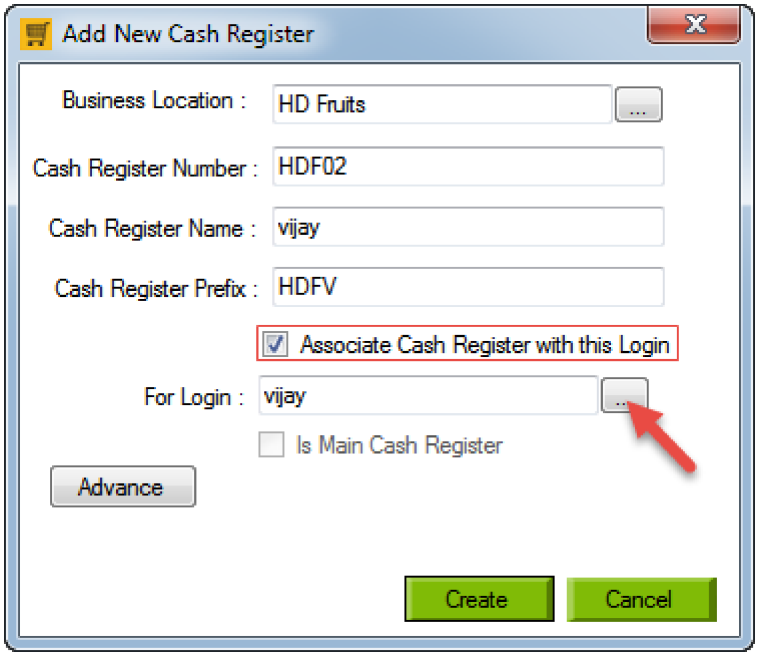
3. In the **Add New Cash Register** screen

a. Select the business location which the employee should login to

b. Provide a **Cash Register Name, Number** and **Prefix.**



c. Select '**Associate Cash Register with this Login**' login and select the employee's login id you want to associate with this cash register.

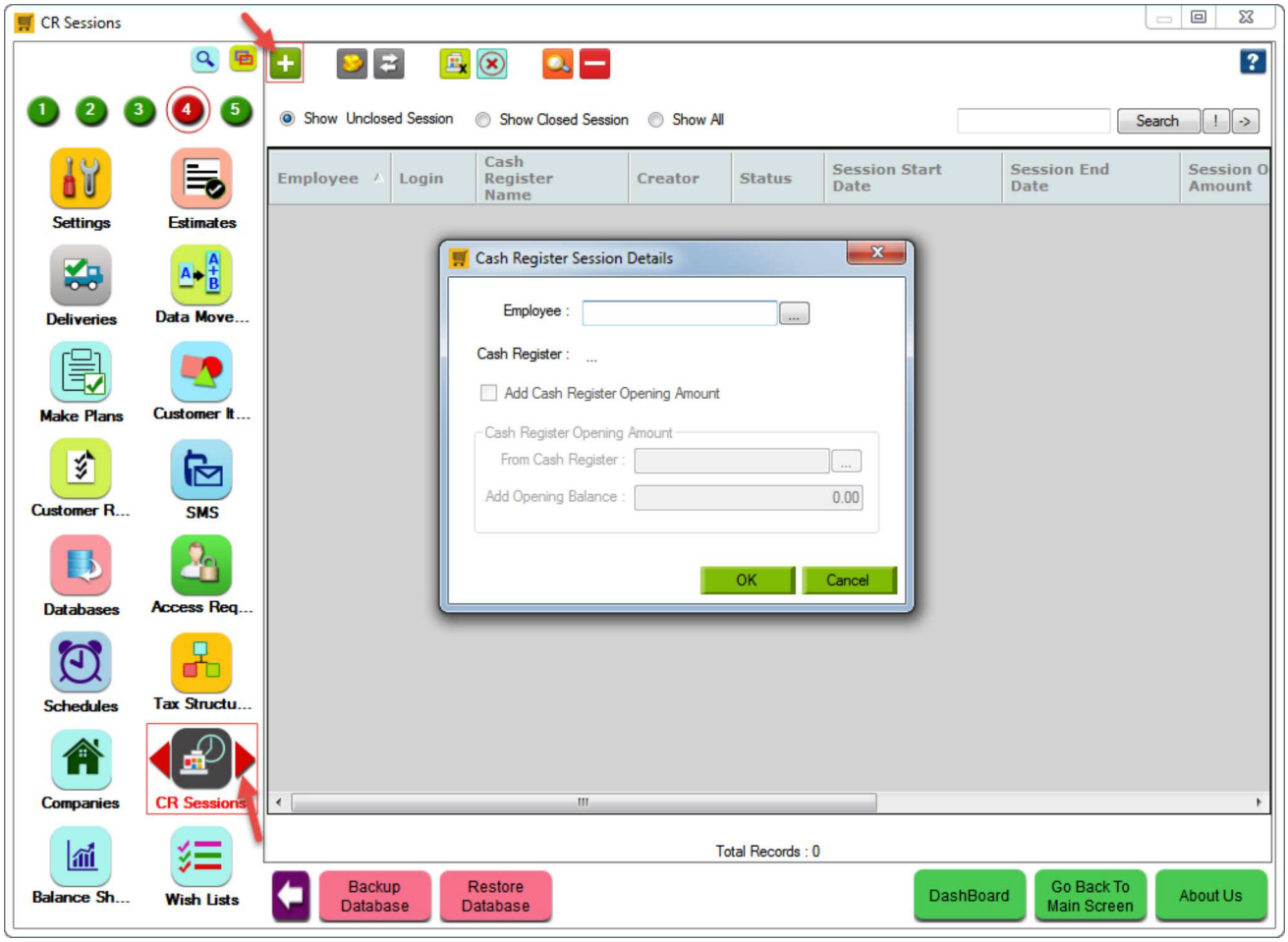


d. Click on **Create**.

Step 3: Create a **session** for the employee:

1. From the **4th page** of **Setup** select **CR Sessions**.

2. From **Manage Cash Register Session** screen, click on **Add Cash Register Session.**



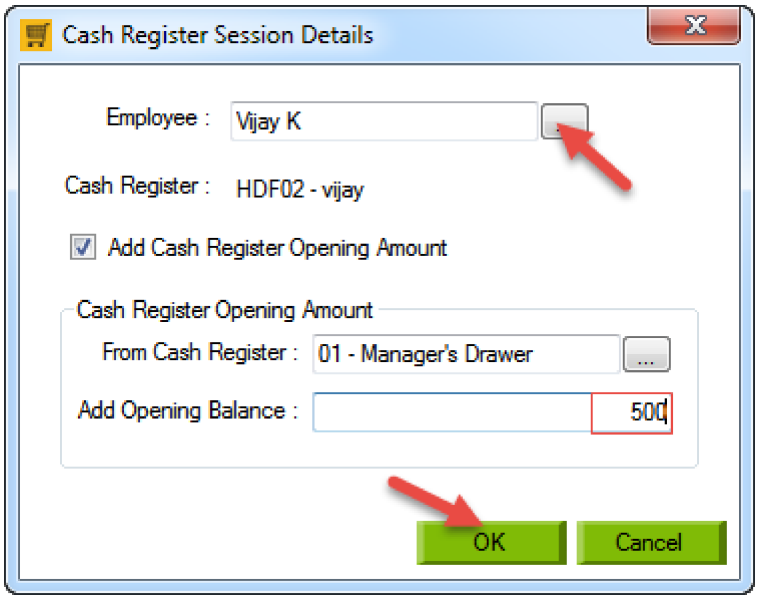
3. In the **Cash Register Session Details** screen, select the employee for whom you want to create a session.

- If you want to add any opening balance to that employee's cash register, check the Checkbox **Add Cash Register Opening Amount**.

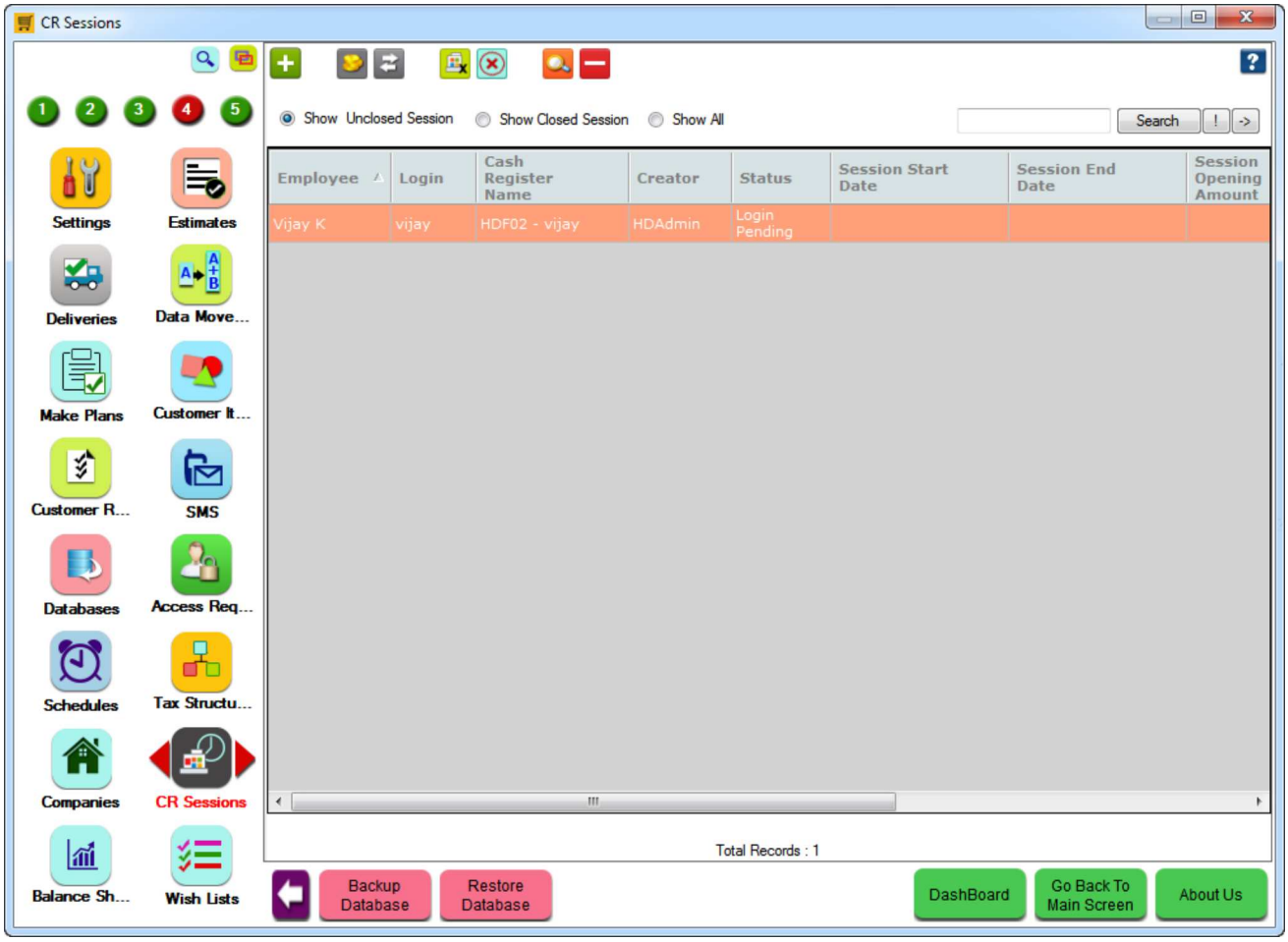
i. **From Cash Register**: Select the cash register which you are transferring amount for employee cash register.

ii. **Add Opening Balance**: Enter the amount for opening balance.

- Click on **OK**.



4. You can see the session as shown below.



You can see the **Status** as **Login Pending**. When that employee logs in to HDPOS then that status will be changed to **Active**.

Step 4: How to login to a session:

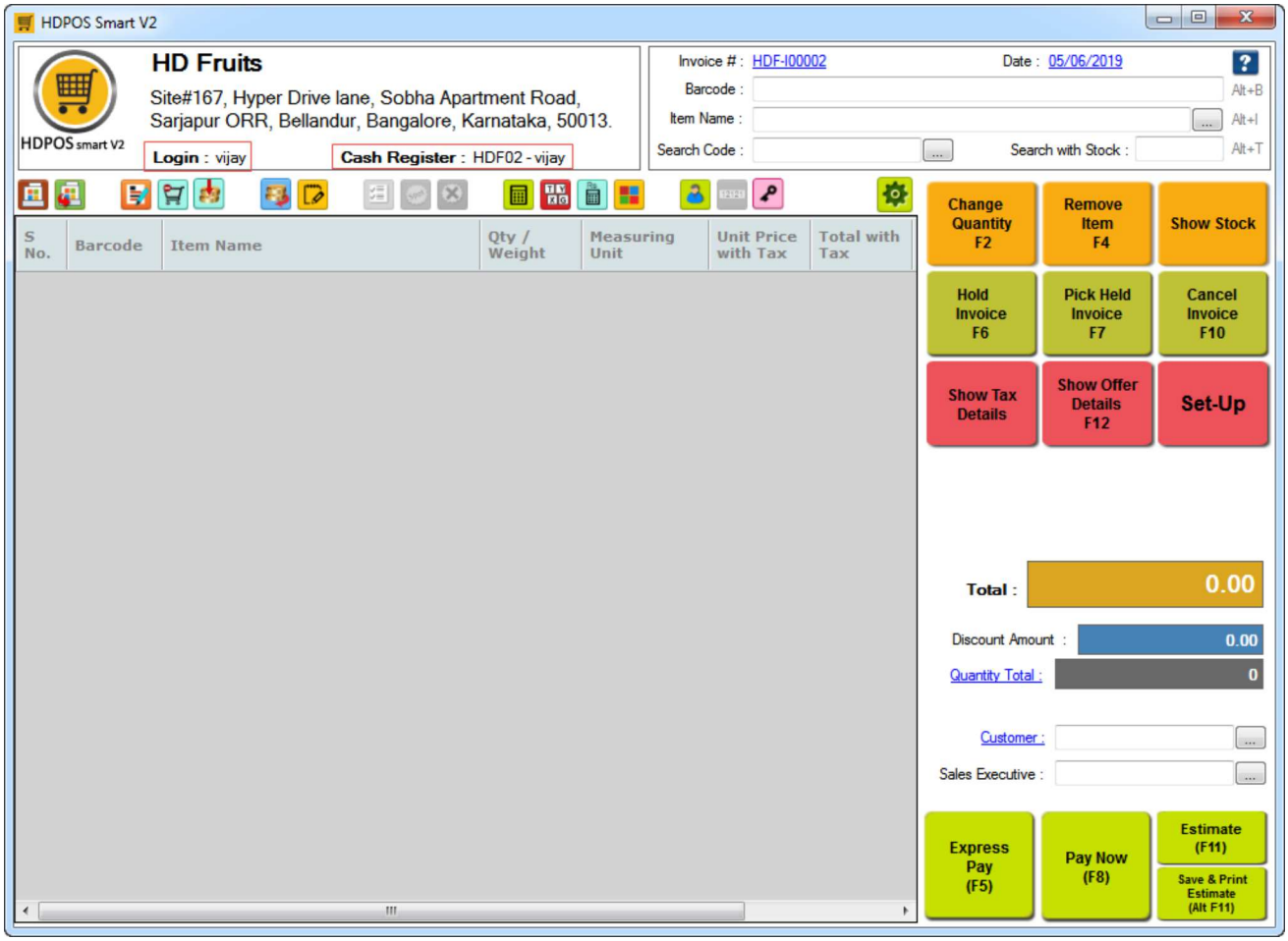
To login to a session here is what your employee will need to do

1. Run HDPOSsmart.

2. In the login screen that appears login will your employees id.



3. You will notice that your employee has been logged in to the business location and cash register that you had associated him with.



4. All the invoices created, Sales return, purchases etc. created will get recorded in the employees cash register.

5. When the employee is done with his shift he can logout from HDPOS to close the session.

Step 5: How to close a session:

Once your employee that has used a session and log's out for the day you would need to create a new session for him for the next day. However you will not be able to create a new session till the session is closed and any balance in his cash drawer is transferred to the Manager's or any other cash register.

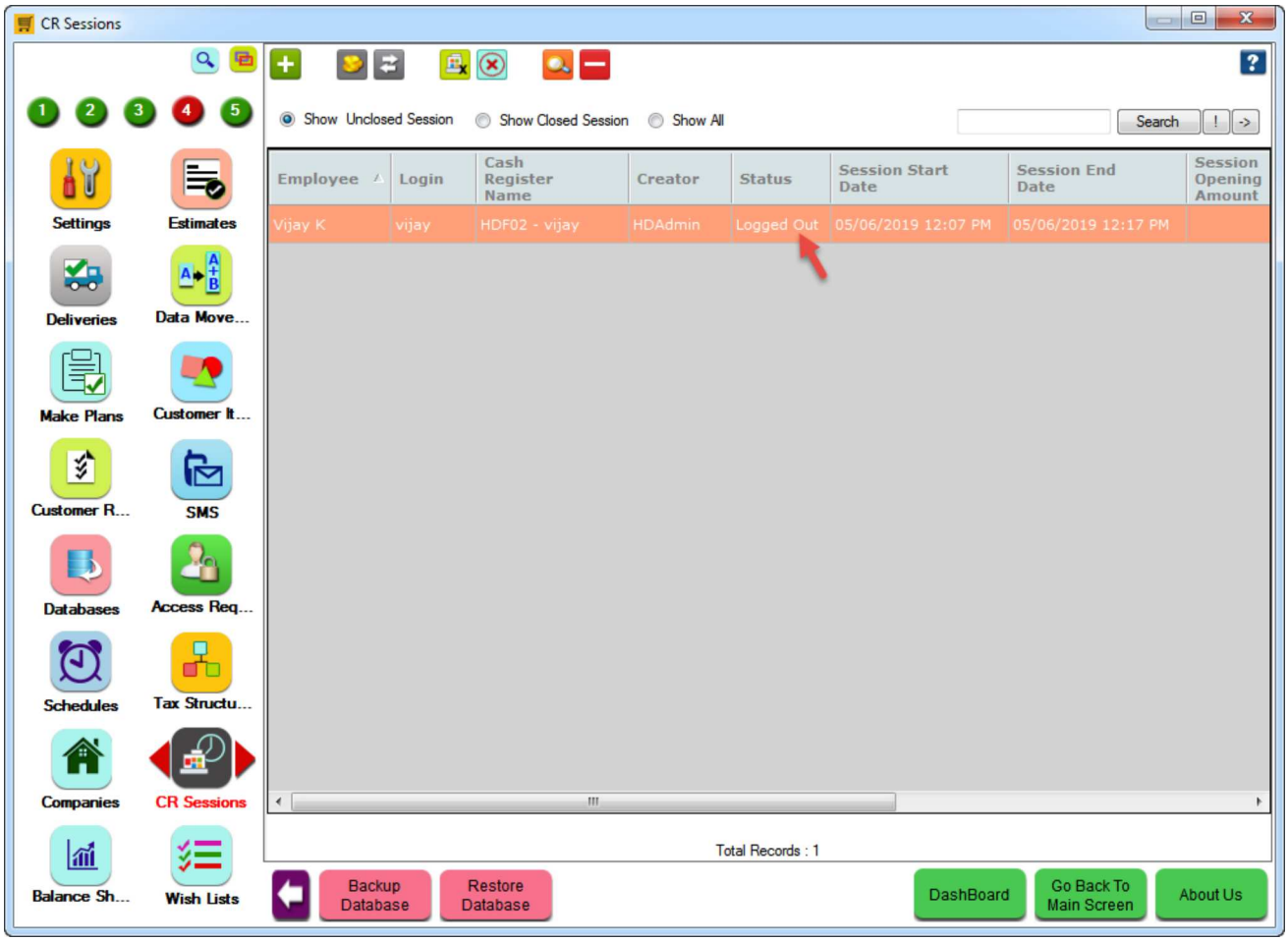
Here is what you would need to do

1. Run HDPOSsmart.

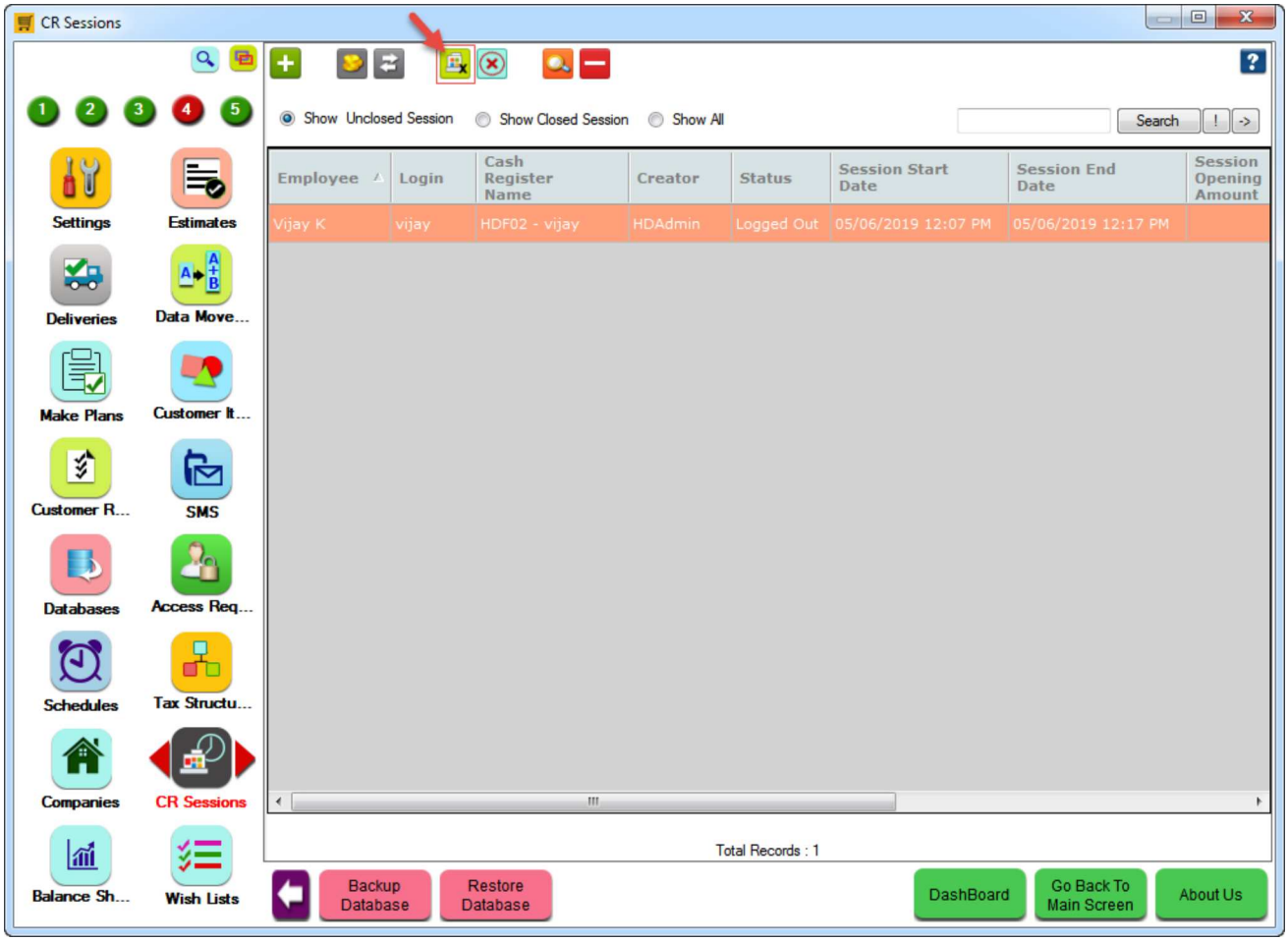
2. Login as HDAdmin.



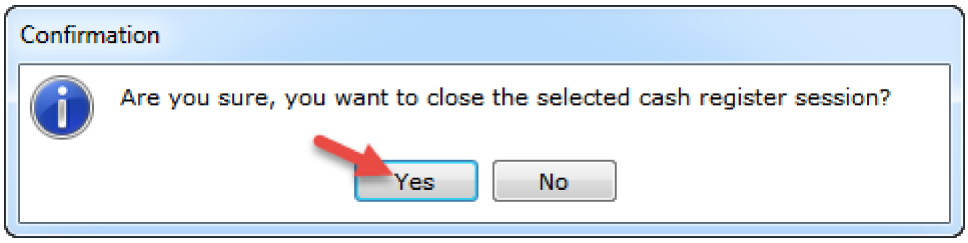
3. From **Setup** go to **4th page** and select **C.R. Session**. You will see the status of the session you created for your employee is changed to logged out.



4. Select the employee's session and click on **Close Cash Register Session** option from the tool strip.

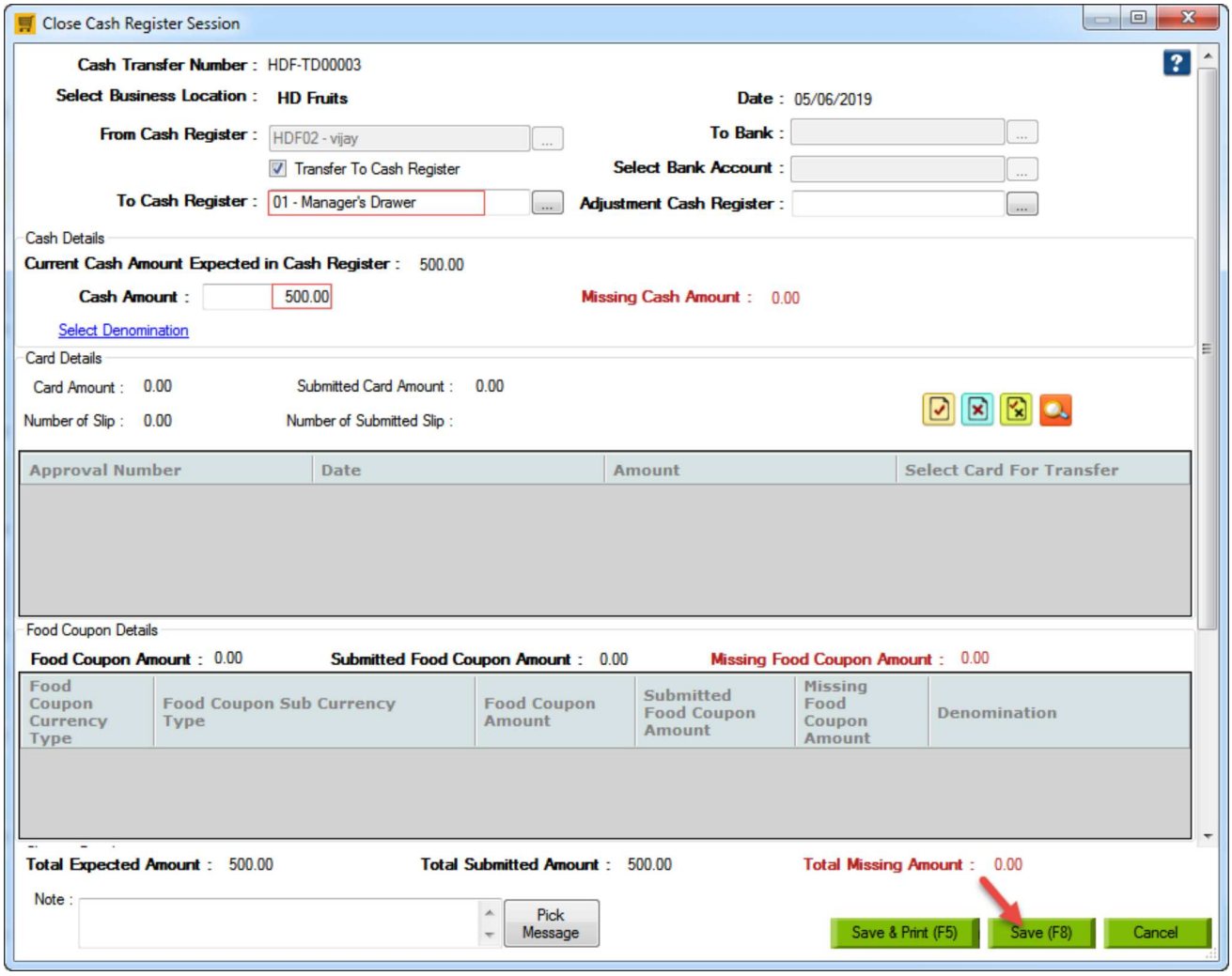


5. You will see the below warning message. Click on Yes.



6. You will see the close cash register session screen.

a. Select the **To Cash register and click on Save**.


Close Cash Register Session
Cash Transfer Number : HDF-TD00003
Select Business Location : HD Fruits
Date : 05/06/2019
From Cash Register : HDF02 - vijay
To Bank :
Transfer To Cash Register
Select Bank Account :
To Cash Register : 01 - Manager's Drawer
Adjustment Cash Register :
Cash Details
Current Cash Amount Expected in Cash Register : 500.00
Cash Amount : 500.00
Missing Cash Amount : 0.00
Select Denomination
Card Details
Card Amount : 0.00
Submitted Card Amount : 0.00
Number of Slip : 0.00
Number of Submitted Slip :
Approval Number
Date
Amount
Select Card For Transfer
Food Coupon Details
Food Coupon Amount : 0.00
Submitted Food Coupon Amount : 0.00
Missing Food Coupon Amount : 0.00
Food Coupon Currency Type
Food Coupon Sub Currency Type
Food Coupon Amount
Submitted Food Coupon Amount
Missing Food Coupon Amount
Denomination
Total Expected Amount : 500.00
Total Submitted Amount : 500.00
Total Missing Amount : 0.00
Note :
Pick Message
Save & Print (F5)
Save (F8)
Cancel