USER GUIDE · VERSION 1

Master data

The one list of staff and outlets that every other module reads, so a person or outlet is typed in once and appears everywhere.

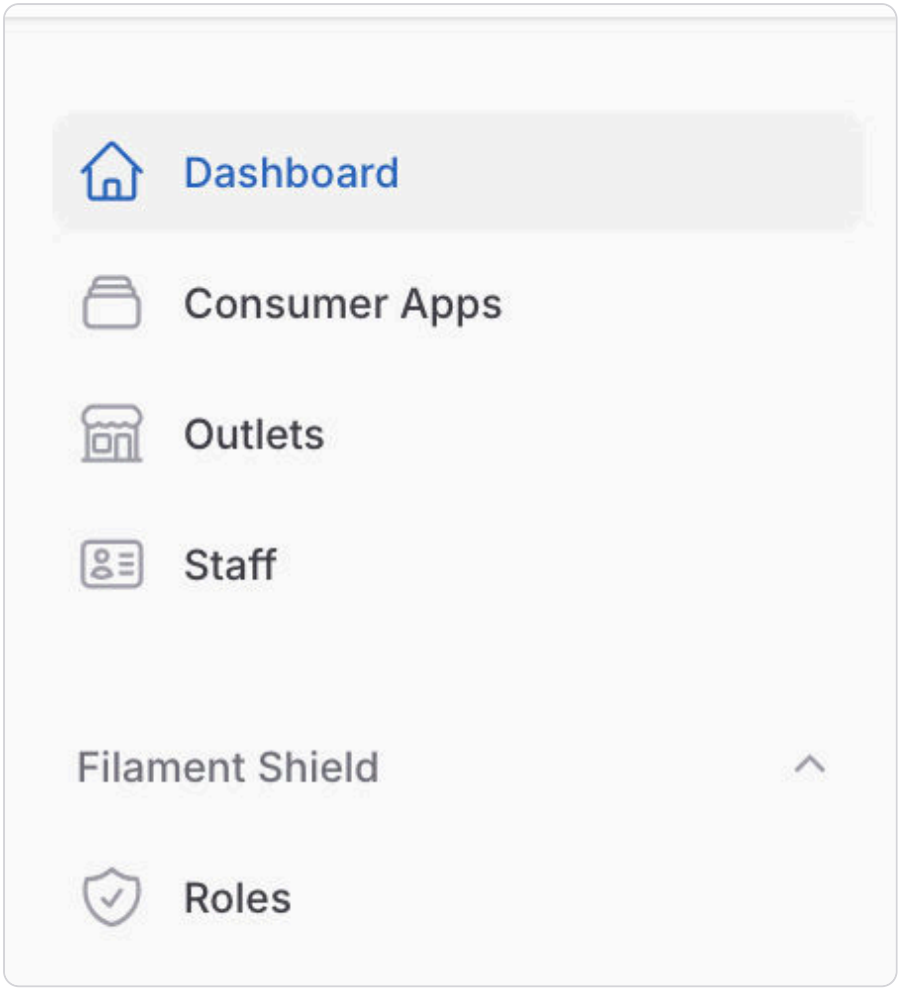
1. What it is for
2. Find a staff member
3. Add or change a staff member
4. Add or change an outlet
5. Connect another module
6. Who can do what

MASTER DATA

What it is for

For: Everyone

Master data keeps your company's staff list and outlet list in one place. The other modules, such as the staff portal, the payment system and inventory, copy these lists from here on a timer that each module sets (inventory, for example, every five minutes). When someone joins, moves outlet or leaves, you change it here once, and every module picks up the change on its next copy.



Who uses it

- **hr**: the human resources team. They add and change **Staff** and **Outlets**.
- **super_admin**: the administrator. Everything **hr** can do, plus **Consumer Apps** (which modules may read the lists) and **Roles**.

These are the role names as they appear on the **Roles** screen.

What it needs

- Staff sign in with the company's shared sign-in, or from the staff portal.
- Nothing else. Master data does not read from any other module; the other modules read from it.

What is not on screen

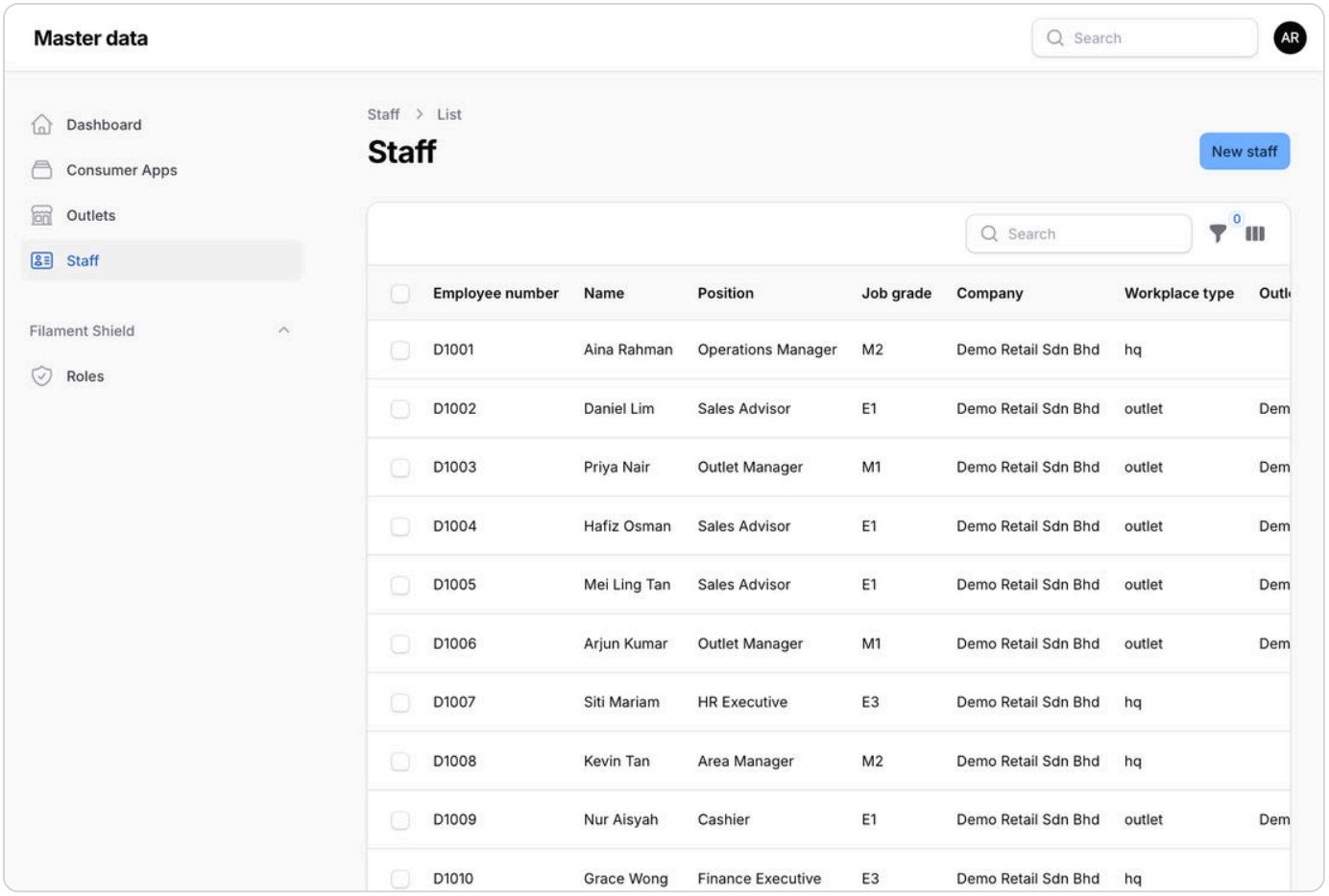
- Giving a person a role is done by your system supplier. There is no screen for it yet.
- Loading a whole staff list from a file is also done by your system supplier.

MASTER DATA

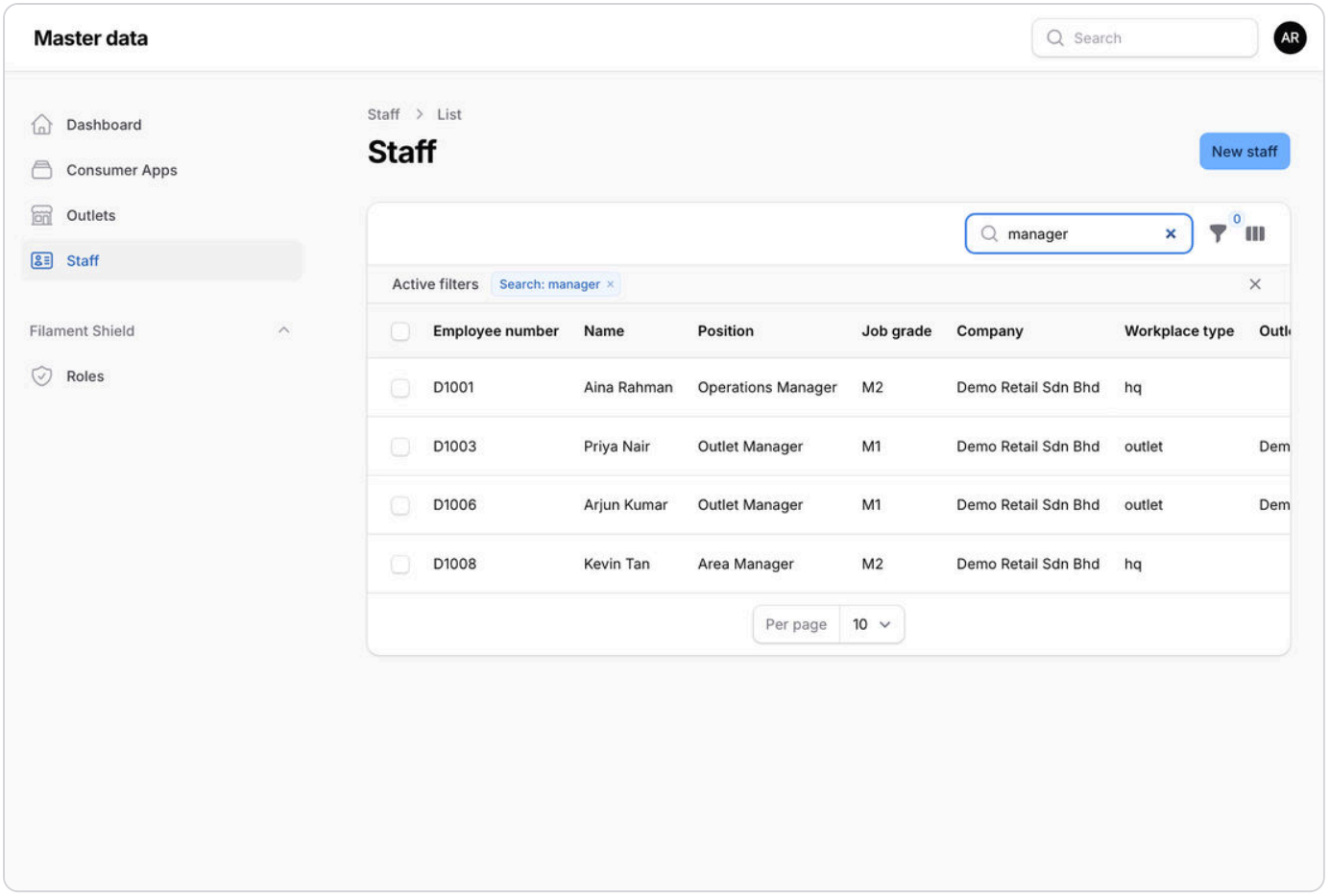
Find a staff member

For: HR

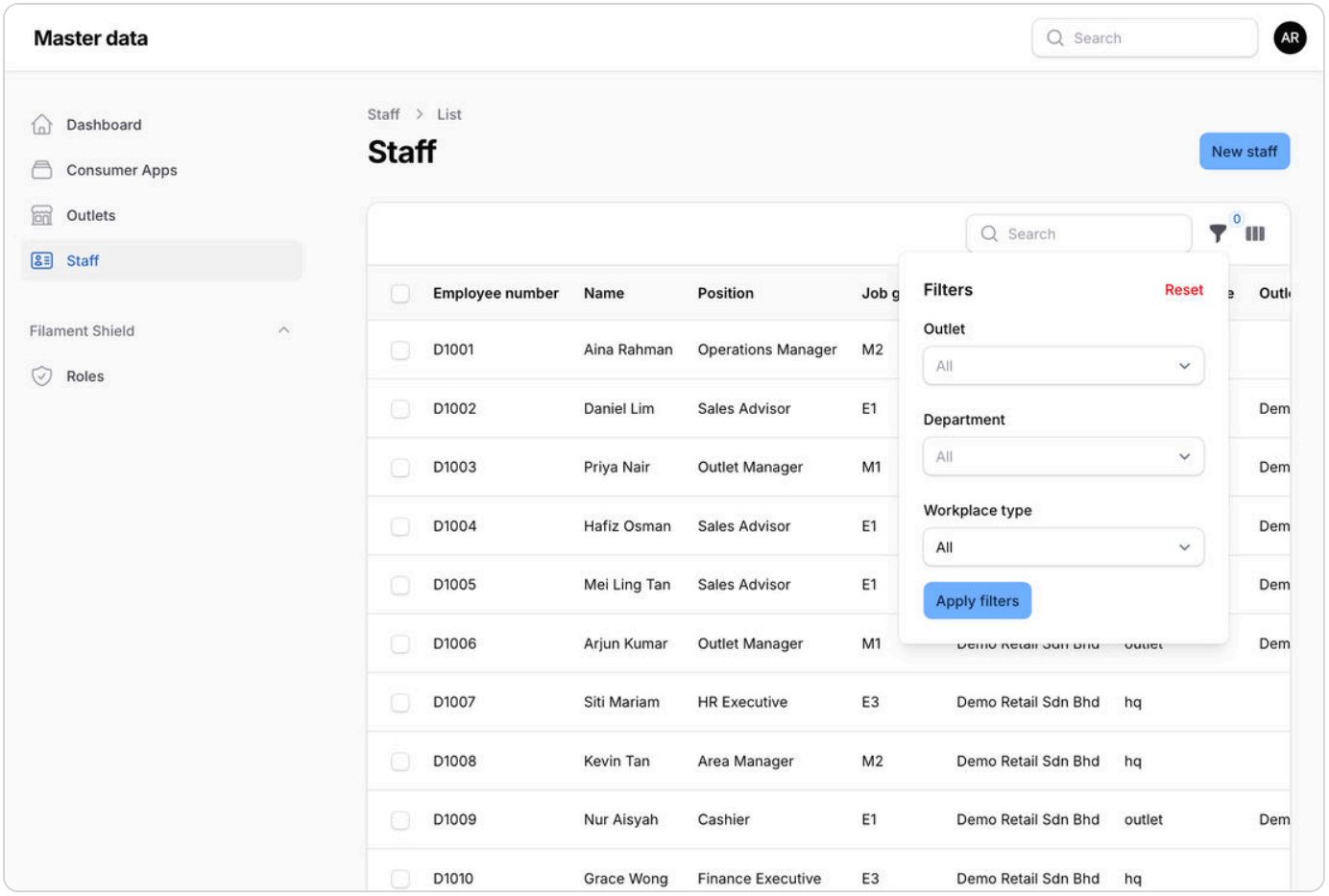
1. Open **Staff** in the menu on the left.



2. Type in **Search** above the table. It looks in the employee number, name, position, job grade, company, workplace type, outlet, department and phone number.



3. To narrow the list, press the funnel button next to **Search**. Pick an **Outlet**, a **Department** or a **Workplace type**, then press **Apply filters**. **Reset** clears them.



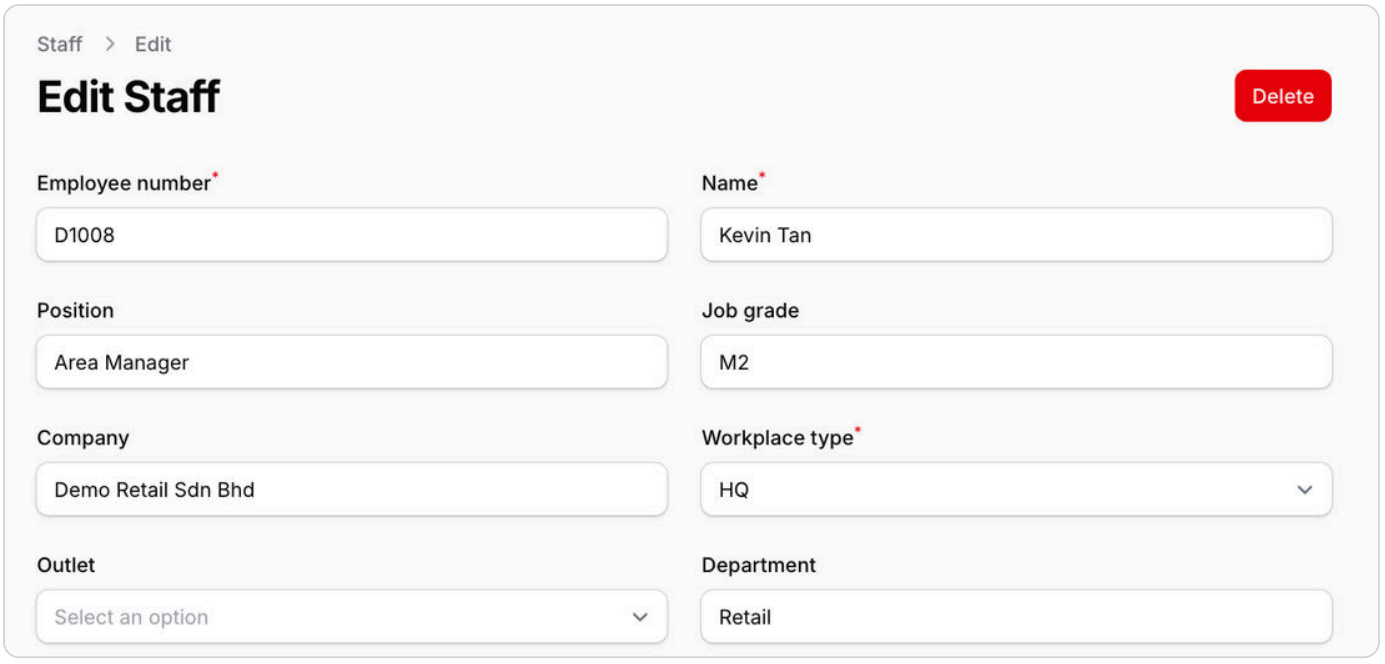
The list is wider than most screens. Scroll the table sideways to see **Outlet**, **Department**, **Phone no** and **Is active**. The button with three bars, next to the funnel, chooses which columns to show.

MASTER DATA

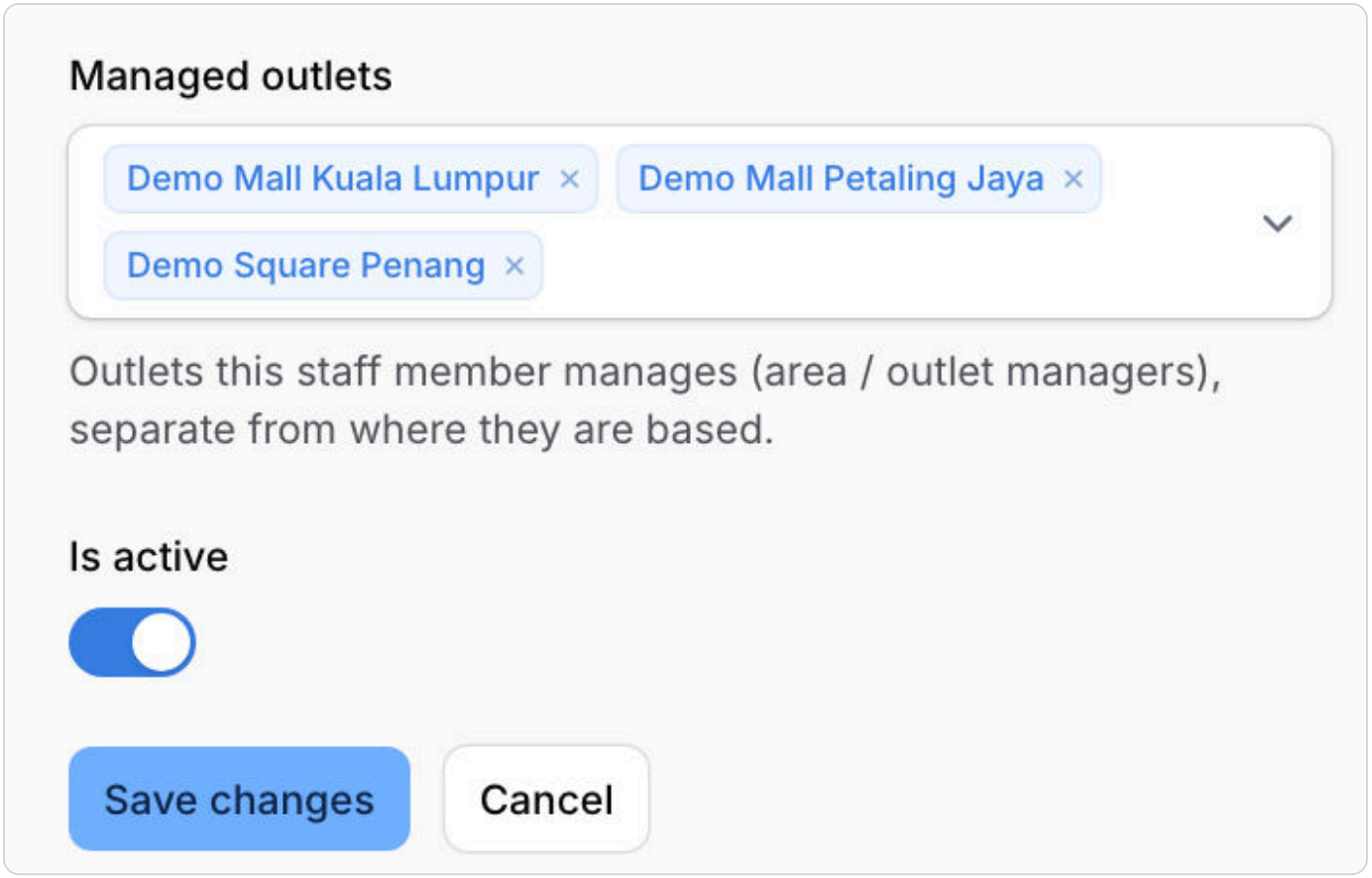
Add or change a staff member

For: HR

1. Open **Staff** in the menu.
2. Press **New staff** at the top right, or **Edit** at the end of a person's row.
3. Fill in the details. **Employee number**, **Name** and **Workplace type** must be filled in.
    - **Workplace type**: **Outlet** for someone based in a shop, **HQ** for head office.
    - **Outlet**: where the person is based. Leave it empty for head office staff.



4. **Managed outlets**: for an outlet manager or area manager, pick every outlet they look after. This is separate from where they are based. Other modules use it to know which outlets a manager looks after.
5. **Phone no**: the mobile number the person signs in with, written in full with the country code, for example +60123456789. This is how the other modules match a signed-in person to their staff record. If it is wrong or missing, the person signs in but the modules do not know who they are.
6. Press **Create** (new person) or **Save changes**.



When someone leaves

Switch off **Is active** and save. Avoid **Delete**: it removes the person for good, and a module that already copied them can keep its old copy until its next full refresh. Switching off keeps the record that they worked here, and the other modules see them as inactive.

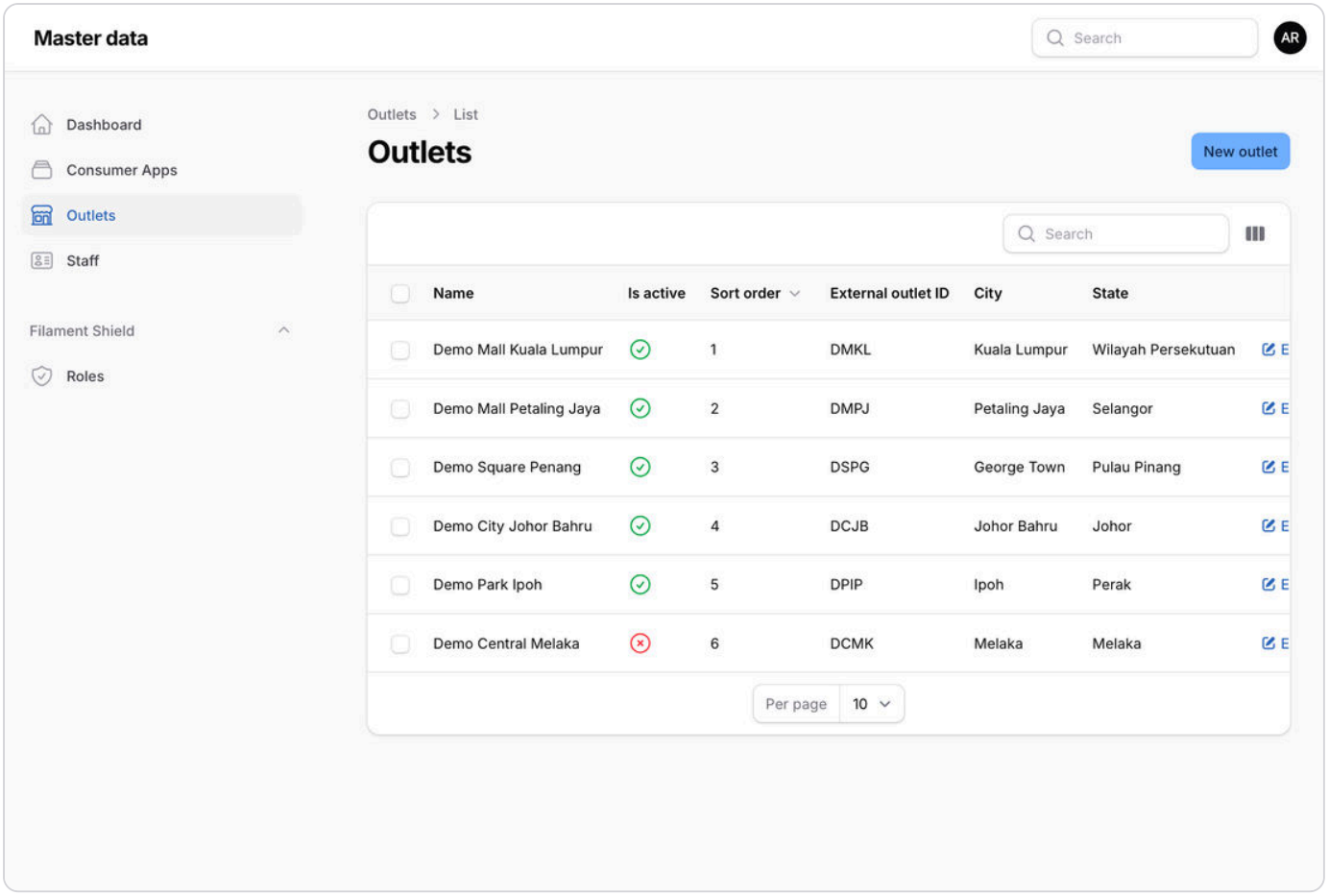
Changes reach the other modules on their next copy. A module may show the old details until then.

MASTER DATA

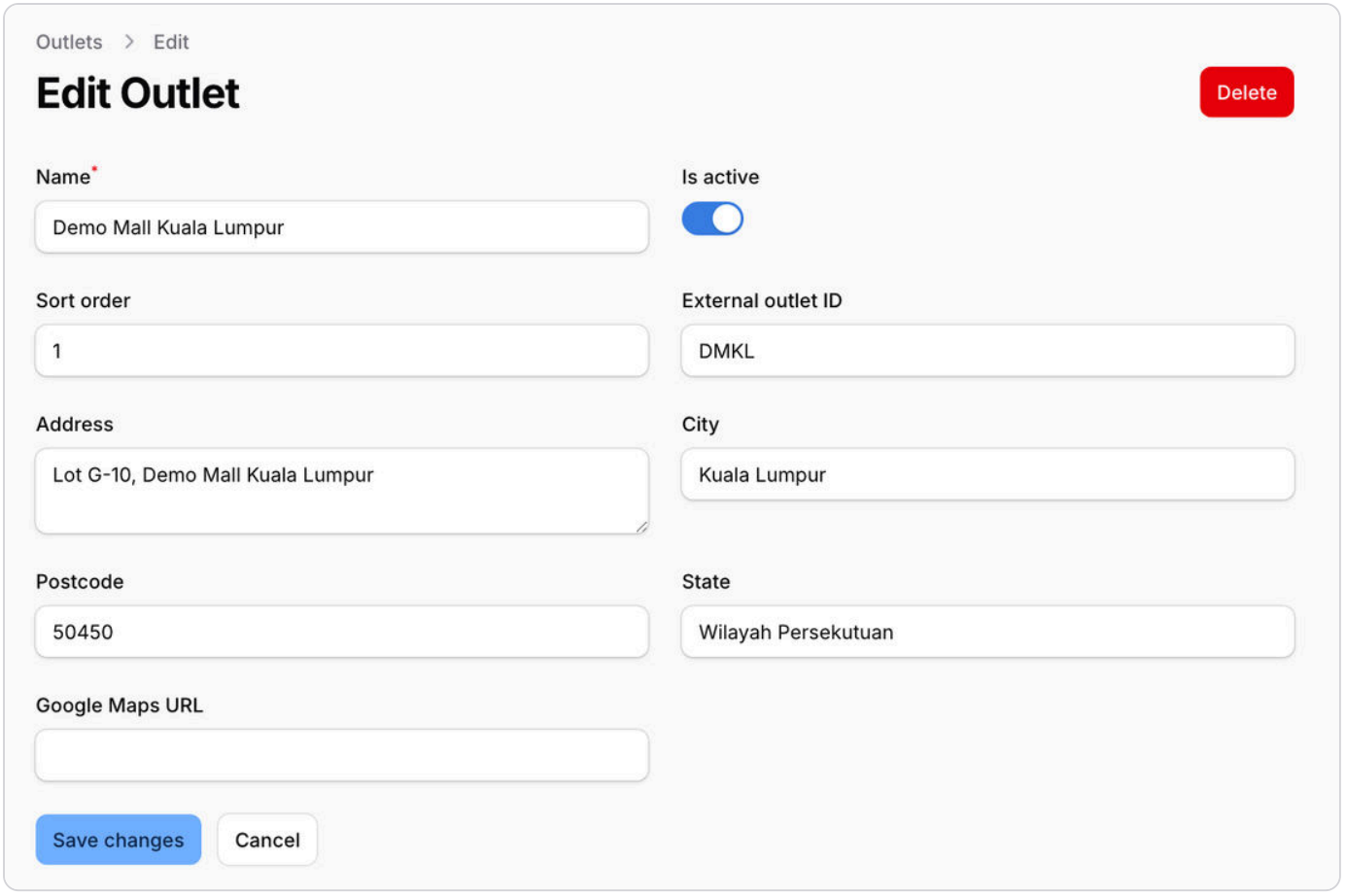
Add or change an outlet

For: HR

1. Open **Outlets** in the menu on the left.



2. Press **New outlet**, or **Edit** at the end of an outlet's row.
3. Type the **Name**. This is the name every module shows.
4. **Sort order** decides where the outlet appears in lists in the other modules. Lower numbers come first.
5. **External outlet ID** is the outlet's code in your till system. Fill it in when the outlet has one, so the till, inventory and payment records line up.
6. Add the **Address**, **City**, **Postcode** and **State**. **Google Maps URL** is optional: paste the link from Google Maps' Share button.
7. Press **Create** or **Save changes**.



When an outlet closes

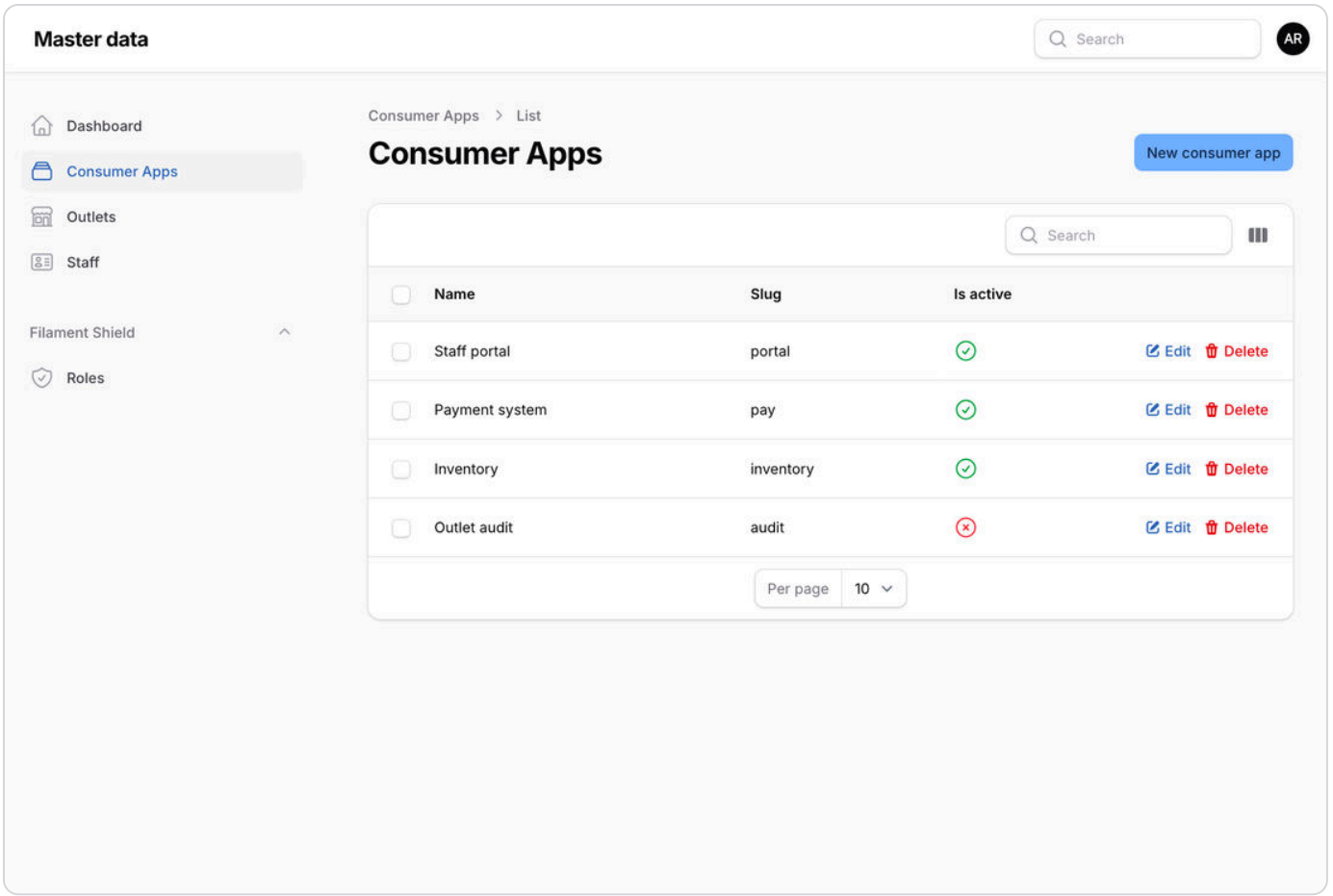
Switch off **Is active** and save, rather than deleting it. Staff and old records in other modules still point at it.

Connect another module

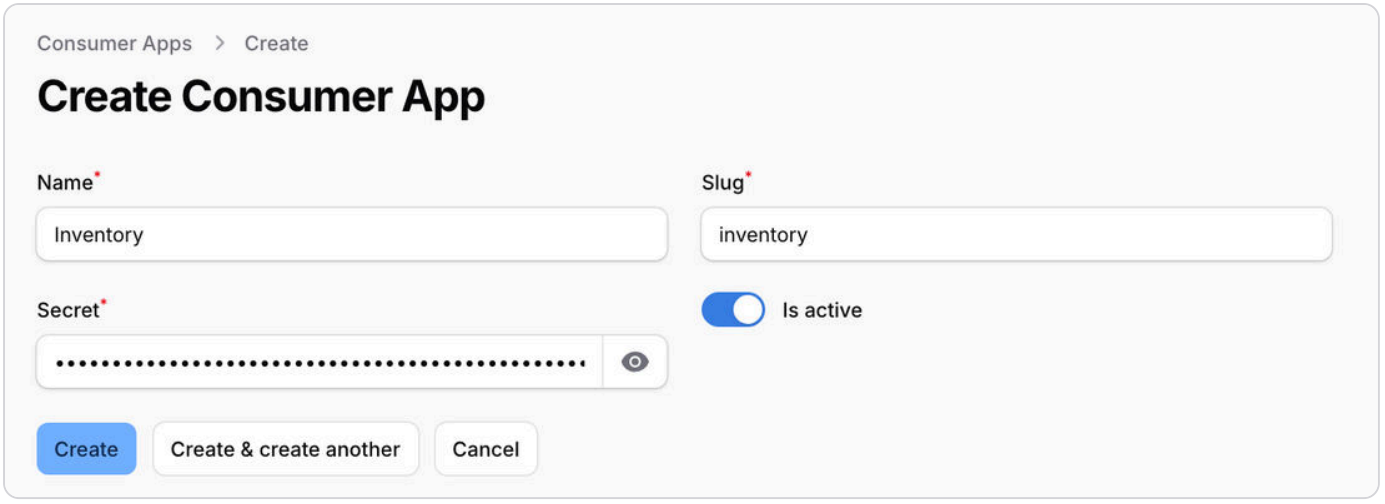
For: Administrators

A module can only read the staff and outlet lists if it is listed under **Consumer Apps**. Each one has its own short name and secret, a password the module uses to prove who it is.

1. Open **Consumer Apps** in the menu on the left.



2. Press **New consumer app**.
3. Type the **Name**, for example Inventory. The **Slug**, the module's short name, fills in by itself. Change it only if the person setting up the module asks for a different one.
4. A **Secret** is made for you. Press the eye button to show it, and copy it.
5. Leave **Is active** switched on, and press **Create**.



Give the slug and the secret to the person setting up that module. They enter both in the module's own settings.

Stop a module reading the lists

- Switch off **Is active** to pause it. Switch it back on to resume.
- **Delete** stops it at once: its slug and secret stop working straight away. It cannot be undone.

MASTER DATA

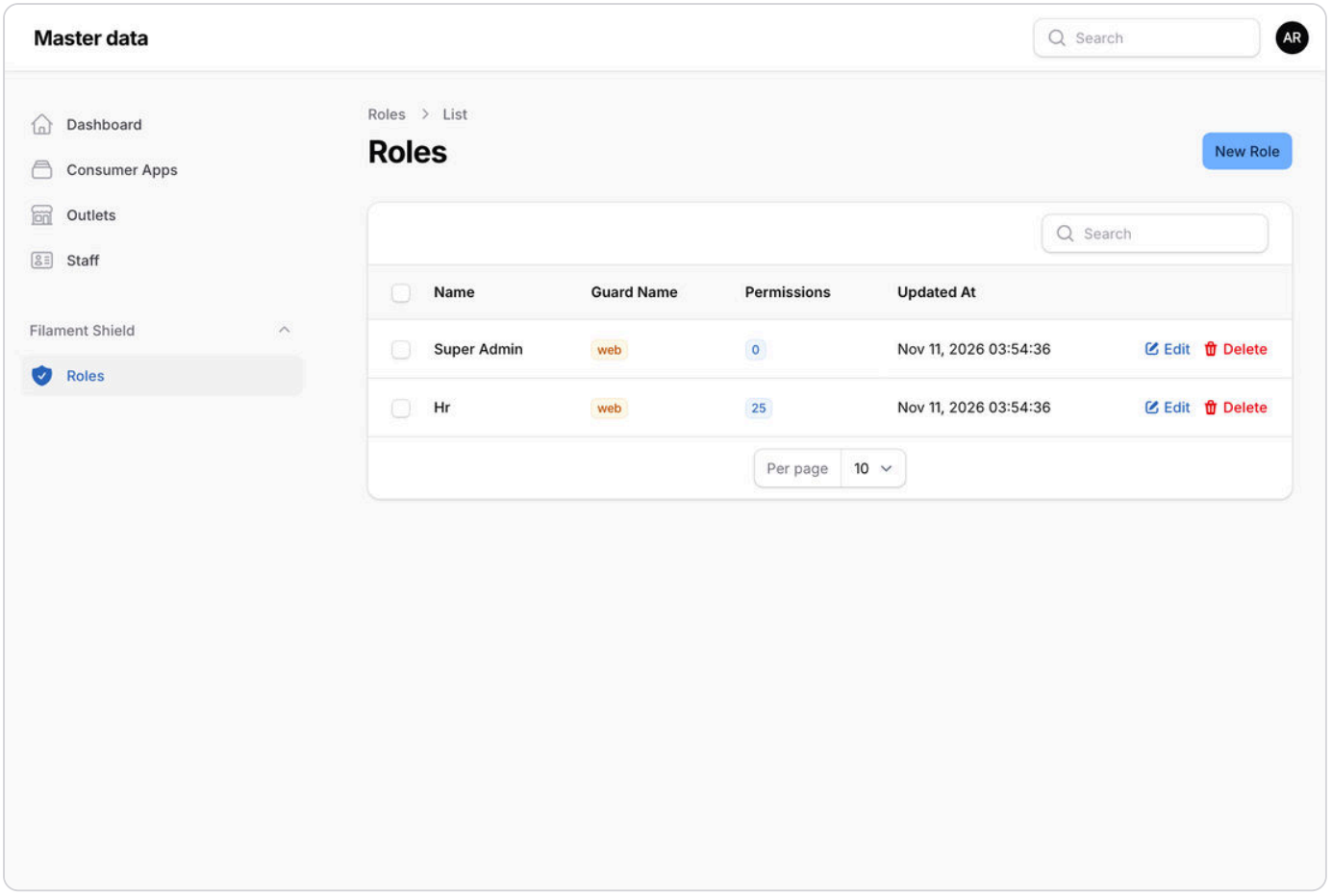
Who can do what

For: Administrators

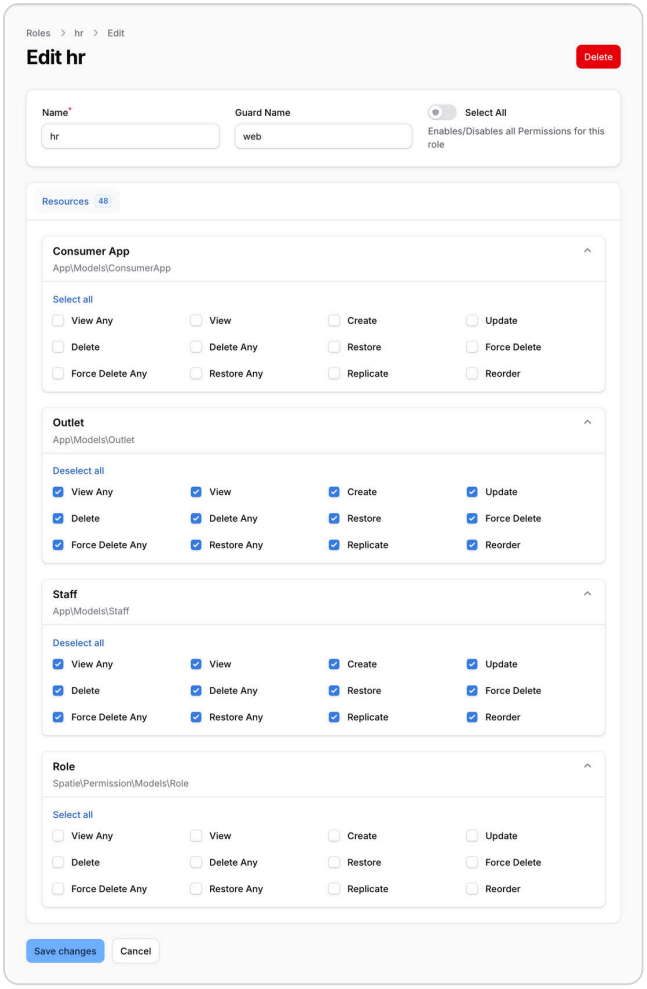
A role is a set of permissions. Two roles exist at the start:

- **super_admin** can do everything.
- **hr** can see, add, change and delete **Staff** and **Outlets**, and nothing under **Consumer Apps**.

1. Open **Roles** under **Filament Shield** in the menu.



2. Press **Edit** next to a role.
3. Each screen has its own group of tick boxes. **View Any** lets the person open the list, **View** opens one record, **Create** adds, **Update** changes and **Delete** removes. **Select all** ticks a whole group.
4. Press **Save changes**.



Not on this screen yet

- A role made here cannot open Master data at all: the permission to enter has no tick box. Use **hr** or **super_admin**, or ask your system supplier to add a new role properly.
- Giving a role to a person is done by your system supplier.
- Today the **hr** role can also open **Roles** and change them, although its **Role** boxes are not ticked. Keep this in mind until it is fixed.