



© 2016 Coherent Software Solutions

Security and Control

For Aura 6.3

Contents

Access Permissions	2
Recommended Minimum Access Levels	5
Restricted Employee Categories	6
Activity Reports	9
Report Types	9
Analysing Activity Reports	10
System Health Reports	11
Report Types	11
Important Security Settings	14
Blind Cashup	14
Allow Reprint	15
Separate Invoicing Passwords	15
Force password change every [x] day(s)	16
Cashup Settings	17
Useful Control Tools	18
SMSAgent	18
Report Scheduler	18
Office Contact Details	19
Aura Helpdesk Hours	19

Aura Security Setup

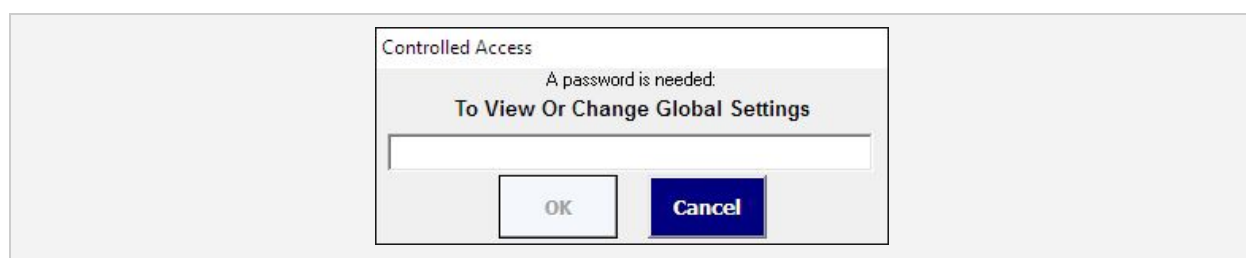
For any store owner, and in fact with any software system that deals with financial data, a good security policy is extremely important. Due to the fact that many people in a store environment will need to use the Aura system, it's important to be able to control access to information and abilities, and then be able to review user activity and adjust the system accordingly.

The Aura point of sale system provides the tools to be able to do this effectively for your store. This guide will take you through the steps of a recommended security setup, and explains how to review and analyse user activity. Please note that this is a general recommendation, please feel free to modify it based on your needs, and be sure to consult the Aura product manuals for more detailed information on these different areas and reports.

Access Permissions

The first step in creating a security policy is assigning different levels of access to each category of employee that uses Aura. This way you can make sure that the cashier has access to make sales but not access Backoffice, and that managers have access to what they need to do their jobs while keeping sensitive information private. Permissions are assigned by category instead of each employee individually.

Every action in Aura that requires a user password (or a fingerprint if fingerprint scanners are used) is known as an **Access Permission**. The bolded text is the name of the permission that requires the password.

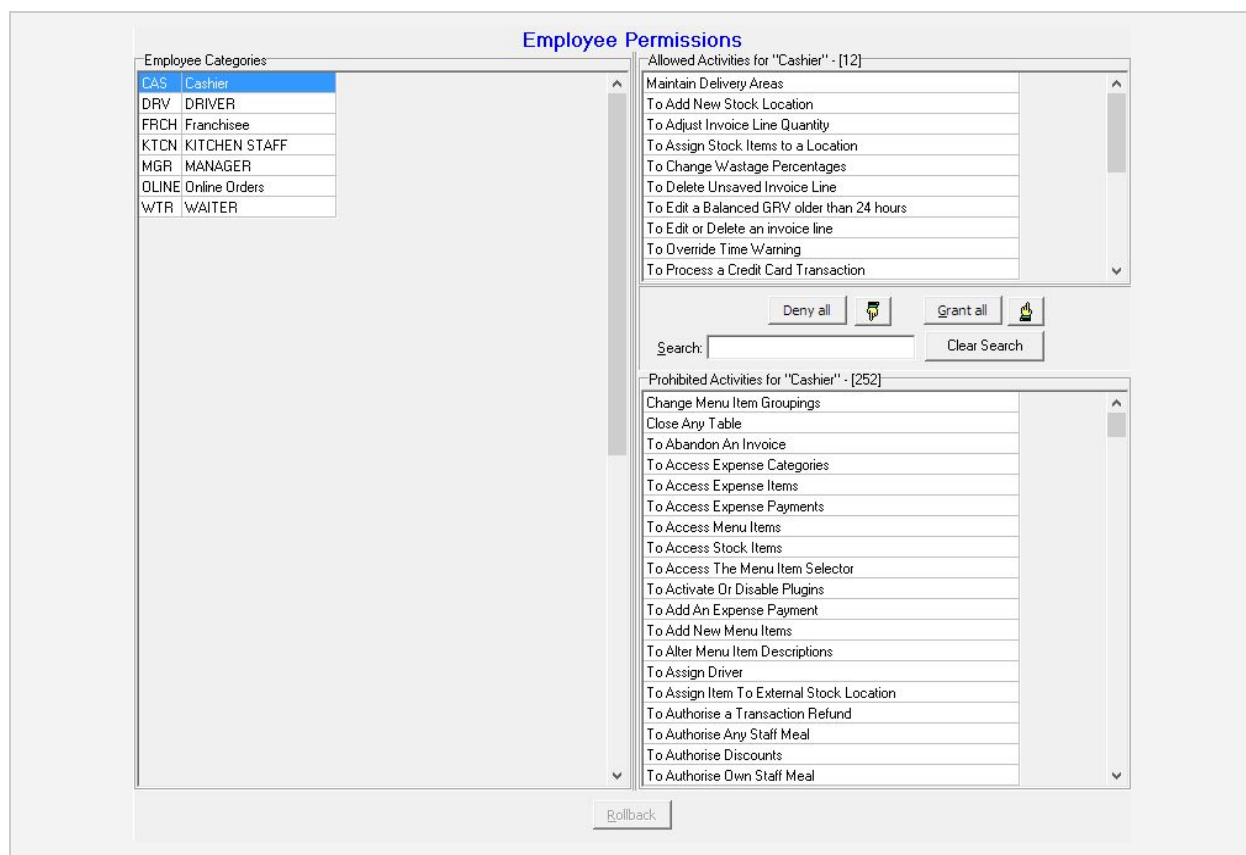




In this example, **To View or Change Global Settings** is the name of this particular permission, and the name that will appear in the *Access Permissions* screen and Activity reports.

Access Permissions setup

To configure your access permissions, open **Backoffice**, and click *Preferences > Access Permissions*.

To assign an access permission, select the Category you want to edit in the left window. On the right, the permissions are divided into **Allowed** and **Prohibited**.



1. Select the category you want to edit the permissions for
2. If you want to deny a permission, select it from the **Allowed** (top) window and click the **Deny** button  to move it down to **Prohibited** (DO NOT use Deny All).
3. If you want to allow a permission, select it from the **Prohibited** (bottom) window and click the **Grant** button  to move it up to **Allowed** (DO NOT use Grant All).
4. The list of permissions can be filtered using the **Search** bar to find permissions regarding the same topic.

The screenshot displays a security configuration window. At the top, a title bar reads "Allowed Activities for 'Cashier' - [4] matching 'invoice'". Below this is a list of four activities, each on a yellow background: "To Adjust Invoice Line Quantity", "To Delete Unsaved Invoice Line", "To Edit or Delete an invoice line", and "To Process Invoices". To the right of this list is a vertical scrollbar. Below the list are four buttons: "Deny all" (with a red 'X' icon), "Rollback" (with a circular arrow icon), "Grant all" (with a green checkmark icon), and "Clear Search" (with a trash can icon). A red rectangular box highlights the "Search:" text field containing the word "invoice" and the "Clear Search" button. Below the highlighted area, another title bar reads "Prohibited Activities for 'Cashier' - [13] matching 'invoice'". This is followed by a list of thirteen activities, each on a yellow background: "To Abandon An Invoice", "To Browse Old Invoices", "To change invoice allocation between waiters", "To Edit An Already Assigned Invoice", "To Mark Any Invoice as a Late Delivery", "To Modify Invoices", "To Over-Ring An Invoice", "To Print Old Invoices", "To Re-Print An Invoice", "To Run Invoice Efficiency Report", and "To Run Invoice Maker Report". To the right of this list is another vertical scrollbar.

5. These groups can be added individually as above or the entire group can be allowed or denied using **Deny all** or **Grant all**.
6. Any errors that are made can be undone using the **Rollback** button at the bottom of the screen to revert the changes to the point they were at when the screen was first opened.

Below is a list of recommended access levels for each category.

Recommended Minimum Access Levels

Below is a list of access permissions that is recommended as a minimum for most stores. This is only a guide, and permissions should be tweaked to allow for the best efficiency of work in the store while still retaining security.

For more detail on what each access permission controls, see the *Aura Backoffice Manual*, under the **List of Access Permissions** on Page 193.

Driver

Drivers should only ever be able to assign orders to themselves, as that will be their only interaction with the Aura system:

<i>To Assign Driver</i>

Cashier

The cashier's permissions allow them to process orders, and give them the ability to edit the invoice before receiving payment only. They can assign orders to drivers, and they have no control over how shifts are started or cashed up.

<i>To Access The Menu Item Selector</i>
<i>To Adjust Invoice Line Quantity</i>
<i>To Assign Driver</i>
<i>To Process a Credit Card Transaction</i>
<i>To Process Invoices</i>
<i>To Adjust Invoice Line Quantity</i>
<i>To Delete Unsaved Invoice Line</i>

Waiter

Waiters are only able to process their own table orders. They have the ability to modify invoices after they've been saved. They have no control over how shifts are started or cashed up.

<i>To Access The Menu Item Selector</i>	<i>To Close A Table</i>
<i>To Adjust Invoice Line Quantity</i>	<i>To Edit An Already Assigned Table</i>
<i>To Process a Credit Card Transaction</i>	<i>To Modify Invoices</i>
<i>To Process Invoices</i>	<i>To Void An Invoice Line</i>
<i>To Adjust Invoice Line Quantity</i>	<i>To Split or Group an Invoice</i>
<i>To Delete Unsaved Invoice Line</i>	

Manager

Managers have the ability to control shifts and cashup on Invoicing. They have access to Backoffice, it's stock recording pages, employee management and reports. They do not have access to system settings, access control or to change set menu and stock items.

<i>To Access The Menu Item Selector</i>	<i>To Lock A Till Shift</i>
<i>To Adjust Invoice Line Quantity</i>	<i>To Maintain Employee Details</i>
<i>To Assign Driver</i>	<i>To Maintain Employee Passwords</i>
<i>To Process a Credit Card Transaction</i>	<i>To Manufacture Stock</i>
<i>To Process Invoices</i>	<i>To Mark Any Invoice as a Late Delivery</i>
<i>To Adjust Invoice Line Quantity</i>	<i>To Modify Cashup Entries</i>

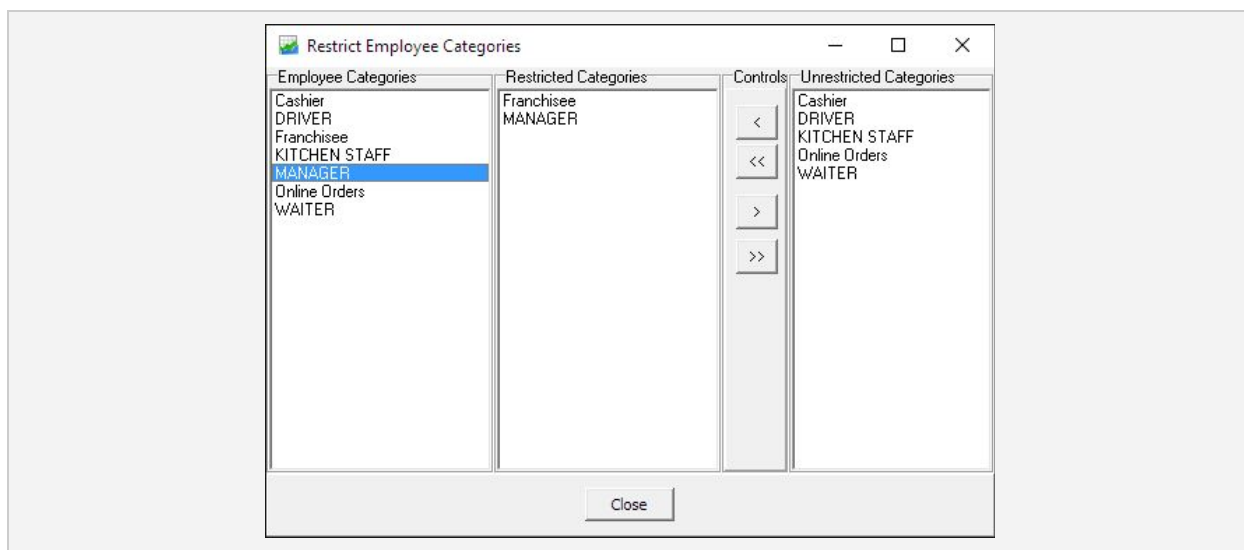
<i>To Delete Unsaved Invoice Line</i>	<i>To Modify Credit Card Cashup Entries</i>
<i>To Close A Table</i>	<i>To Monitor Activity</i>
<i>To Edit An Already Assigned Table</i>	<i>To Monitor Daily Sales</i>
<i>To Modify Invoices</i>	<i>To Monitor Staff Attendance</i>
<i>To Void An Invoice Line</i>	<i>To Monitor Staff Performance</i>
<i>Close Any Table</i>	<i>To Monitor Staff Statistics</i>
<i>To Abandon An Invoice</i>	<i>To Open The Till</i>
<i>To Access Expense Payments</i>	<i>To Open The Till for Inactive Shift</i>
<i>To Access Menu Items</i>	<i>To Over-Ring An Invoice</i>
<i>To Access Stock Items</i>	<i>To Override Price in an External Stock Transfer</i>
<i>To Add An Expense Payment</i>	<i>To Override Time Warning</i>
<i>To Authorise a Transaction Refund</i>	<i>To Partially Pay From Till</i>
<i>To Authorise Any Staff Meal</i>	<i>To Perform A Backup</i>
<i>To Authorise Discounts</i>	<i>To Perform A Stock Take</i>
<i>To Browse Old Invoices</i>	<i>To Pickup All Tables</i>
<i>To Browse Shop Cashup Data</i>	<i>To Post a Till Cashup</i>
<i>To Cashup a Waiter</i>	<i>To Post Shop Cashup</i>
<i>To Change Invoice Allocation Between Waiters</i>	<i>To Print Old Invoices</i>
<i>To Change Reports Favourites</i>	<i>To Print Stock Manufacture Slip</i>
<i>To Close Off Someone Else's Till Shift</i>	<i>To Process a Food Refund</i>
<i>To Confirm Credit Card Override</i>	<i>To Process A Staff Meal Discount</i>
<i>To Convert Collect Order To Delivery</i>	<i>To Process Grvs</i>
<i>To Convert Delivery Order To Collect</i>	<i>To Re-Print An Invoice</i>
<i>To Delete A Customer Record</i>	<i>To Reprint A Credit Card Slip</i>
<i>To Discard Stock</i>	<i>To Reprint A Stock Manufacture Slip</i>
<i>To Do a Partial Quantity Adjustment</i>	<i>To Run Backoffice</i>
<i>To Edit An Already Assigned Invoice</i>	<i>To Run GUI Designer</i>
<i>To Edit or Delete an invoice line</i>	<i>To Run Order Manager</i>
<i>To Edit Stock Take within 24 hours of posting</i>	<i>To Run Street Sweeper</i>
<i>To End A Till Shift</i>	<i>To Split or Group an Invoice</i>
<i>To Exit GUI View</i>	<i>To Transfer Stock</i>



The above permissions do not include report permissions. When looking through the access permissions in BackOffice, reports related permissions will be seen in a format such as "To Run <name> Report". For example: "To Run Gross Profit Report", "To Run Stock Variance Report", etc. These report permissions should for the most part be granted to the manager category. You may choose what reports are appropriate to deny or grant.

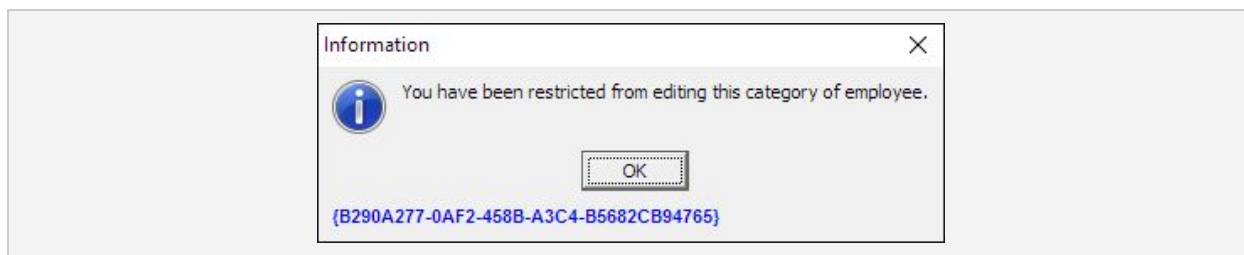
Restricted Employee Categories

After assigning permissions, it's important to be able to prevent an employee from simply editing or changing their category to allow them more access under the **Employee** screen. To do this we have created the ability to restrict the access to some categories from others. In Backoffice, click *Preferences > Restricted Employee Categories*.



1. Select the category you want to apply restrictions to (*i.e Manager*)
2. By default, all other categories will be listed under **Unrestricted**. Click [**<**] to move the categories to **Restricted** (*i.e For our Manager we have made the categories Fanchisee and Manager restricted*)
3. Click **Close** to save the changes.

Now if anyone in that category tries to modify the employee settings of an employee of the restricted category, they will see the following alert:



If someone from a category in which categories are restricted tries to create a new employee, they will only have unrestricted categories available to them:

The screenshot shows a web application window titled "Insert a new employee" with a close button (X) in the top right corner. The window is divided into a left sidebar and a main content area. The sidebar has a blue background and contains a "Back to Employee Details" link with a left arrow, a "Step 2 of 3 Employee Settings" indicator, and a "Next Step Employee Wages" link with a right arrow. The main content area is titled "Employee Settings" with the subtitle "Configure employee access and roles." It contains several form fields: a "Category" dropdown menu with a list of options (Cashier, WAITER, Online Orders, DRIVER, KITCHEN STAFF) and a mouse cursor pointing at "KITCHEN STAFF"; a "KI Colour" dropdown menu set to "Black"; a "Check/Set Fingerprint" button; a "Clear Fingerprint" button; a checked checkbox labeled "Is A Waitron"; an "Invoice Discounts" section with "Max Discount Percentage" and "Max Discount Value" input fields; and a "Staff Discounts" section with "Max Monthly Spend", "Max Discount Percentage", and "Max Discount Value" input fields. At the bottom right of the form are "< Back" and "Next >" buttons.

Activity Reports

Activity reports are one of the best ways to keep track of user behaviour on the Aura system. Every action that is performed in Aura that uses an access permission or alters data is recorded to Aura's **Activity Log**. This activity can be reviewed using the Activity Reports under *Reports > Activity*.

Report Types

There are three types of activity reports:

- **Activity Report by Activity Code:** This report will group activities by the activity itself. This is very useful to identify which user has been making a particular action i.e modifying cashup entries.

AURA **Activity Report** **From 11 May, 2016 to 11 August, 2016**

Activity: CA170 To Modify Cashup Entries

DATE	EMPLOYEE	ACTIVITY	Till ID Computer Desc
03 Jun, 2016 09:02:02	COS Cosoft Cosoft	CA170 Till: 21889 WAGES:R0->R0	13 MANUALS-VM
03 Jun, 2016 09:02:23	COS Cosoft Cosoft	CA170 Till: 21889 WAGES:R0->R10	13 MANUALS-VM
03 Jun, 2016 09:02:33	COS Cosoft Cosoft	CA170 Till: 21889 CRCARDS:R10->R99.9	13 MANUALS-VM
03 Jun, 2016 09:02:46	COS Cosoft Cosoft	CA170 Till: 21889 CRCARDS:R99.9->R209.8	13 MANUALS-VM
03 Jun, 2016 09:03:03	COS Cosoft Cosoft	CA170 Till: 21889 CRCARDS:R209.8->R109.9	13 MANUALS-VM
03 Jun, 2016 09:09:00	COS Cosoft Cosoft	CA170 Till: 21889 CASH:R109.9->R490	13 MANUALS-VM


- **Activity Report by Activity Filter:** This report will filter activity history by the keyword you type in. If you type in "Stock", for example, it will give you results from multiple activities such as "To Perform a Stock Take" and "To Discard Stock". This is useful if you're trying to identify activity in a more general area.

AURA **Activity Report** **From 11 May, 2016 to 11 August, 2016**

Filtering all activities containing: Stock


DATE	EMPLOYEE	ACTIVITY	Till ID Computer Desc
07 Jun, 2016 12:47:08	COS Cosoft Cosoft	ST010 To Perform A Stock Take	1 LT-HLT-BRYAN
07 Jun, 2016 12:48:31	COS Cosoft Cosoft	GV010 GRV19081 Edit Stock# P-103 Qty: 1 Value: R24.46	1 LT-HLT-BRYAN
07 Jun, 2016 12:49:41	COS Cosoft Cosoft	GV010 GRV19081 Edit Stock# P-103 Qty: 1 Value: R24.46	1 LT-HLT-BRYAN
07 Jun, 2016 12:49:56	COS Cosoft Cosoft	GV010 GRV19081 Edit Stock# P-103 Qty: 1000 Value: R24.46	1 LT-HLT-BRYAN
07 Jun, 2016 12:50:33	COS Cosoft Cosoft	GV010 GRV19081 Edit Stock# P-118 Qty: 1 Value: R33.94	1 LT-HLT-BRYAN
07 Jun, 2016 12:51:05	COS Cosoft Cosoft	MT210 To Access Stock Items	1 LT-HLT-BRYAN
07 Jun, 2016 12:51:25	COS Cosoft Cosoft	ST010 To Perform A Stock Take	1 LT-HLT-BRYAN
07 Jun, 2016 12:54:57	COS Cosoft Cosoft	ST010 To Perform A Stock Take	1 LT-HLT-BRYAN
07 Jun, 2016 12:58:52	COS Cosoft Cosoft	RP540 To Run Review Stock Take Report	1 LT-HLT-BRYAN
07 Jun, 2016 12:57:52	COS Cosoft Cosoft	ST140 To Refresh Stock Costs	1 LT-HLT-BRYAN

- **Activity Report by Employee:** This will group activities by employee. Activities will be listed in chronological order. This report is good for investigating the actions of a particular user and identifying patterns of behaviour by that user over time.

<div>  Activity Report By Employee COSOFT (KZN TRAINING) </div>			
From 10 August, 2016 to 10 August, 2016			
Employee: MGF		Manager Cosoft	
DATE	ACTIVITY		Till ID Computer Des
10 Aug,2016 14:36:10	MT010	To Maintain Employee Details	1 LT-HLT-BRYAN
10 Aug,2016 14:36:49	MT010	To Maintain Employee Details	1 LT-HLT-BRYAN
10 Aug,2016 14:41:03	MT010	To Maintain Employee Details	1 LT-HLT-BRYAN

Analysing Activity Reports

It's important to be able to interpret the information that the reports display correctly. Due to the volume of information that is displayed on the reports, some of the data may be abbreviated. Look at the following breakdown of some activity reports to see the way in which the information is presented:

<div>  Activity Report By COSOFT (KZN TRAINING) </div>			
From 11 May, 2016 to 11 August, 2016			
Filtering all activities containing: Stock			
07 Jun,2016 12:47:08	COS	Cosoft Cosoft	ST010 To Perform A Stock Take 1 LT-HLT-BRYAN
<div> These are actions that happened under the code 'GV010', which refers to "To Process GRV's" </div>			GV010 GRV19081 Edit Stock# P-103 Qty: 1 Value: R24.46 1 LT-HLT-BRYAN
			GV010 GRV19081 Edit Stock# P-103 Qty: 1 Value: R24.46 1 LT-HLT-BRYAN
			GV010 GRV19081 Edit Stock# P-103 Qty: 1000 Value: R24.46 1 LT-HLT-BRYAN
			GV010 GRV19081 Edit Stock# P-118 Qty: 1 Value: R33.94 1 LT-HLT-BRYAN
07 Jun,2016 12:51:05	COS	Cosoft Cosoft	MT210 To Access Stock Items 1 LT-HLT-BRYAN
07 Jun,2016 12:51:25	COS	Cosoft Cosoft	ST010 To Perform A Stock Take 1 LT-HLT-BRYAN
07 Jun,2016 12:54:57	COS	Cosoft Cosoft	ST010 To Perform A Stock Take 1 LT-HLT-BRYAN
07 Jun,2016 12:56:52	COS	Cosoft Cosoft	ST010 To Perform A Stock Take 1 LT-HLT-BRYAN
07 Jun,2016 12:57:52	COS	Cosoft Cosoft	ST010 To Perform A Stock Take 1 LT-HLT-BRYAN

Some activities may say "Has Access" meaning that the activity does not ask for a password but is still controlled by access permissions, and the user is granted that permission.				1	LT-HLT-BRYAN
				1	LT-HLT-BRYAN
				1	LT-HLT-BRYAN
				1	LT-HLT-BRYAN
11 Aug,2016 11:19:23	TM010	To Override Time Warning		1	LT-HLT-BRYAN
11 Aug,2016 11:19:25	GI090	To Process Invoices		1	LT-HLT-BRYAN
11 Aug,2016 11:19:37	IN050	Employee: COS Has Access: To Access The Menu Item		1	LT-HLT-BRYAN
11 Aug,2016 11:19:38	IN050	Employee: COS Has Access: To Access The Menu Item		1	LT-HLT-BRYAN
					-HLT-BRYAN
					-HLT-BRYAN
					-HLT-BRYAN
					-HLT-BRYAN
					-HLT-BRYAN
					-HLT-BRYAN
11 Aug,2016 11:20:24	CA171	To Modify Credit Card Cashup Entries			-HLT-BRYAN
11 Aug,2016 11:20:34	CA170	Till : 21878 CASH:R0-> R700			-HLT-BRYAN
11 Aug,2016 11:20:40	CA180	To Post a Till Cashup			-HLT-BRYAN
11 Aug,2016 11:20:53	EX040	To Over-Ring An Invoice:(Authorize Overr			-HLT-BRYAN
11 Aug,2016 11:20:58	EX040	Invoice 927784 O/R at 11:20 R 154.80			-HLT-BRYAN
11 Aug,2016 11:21:08	RP840	Has Access: COS			-HLT-BRYAN
11 Aug,2016 11:21:08	RP840	To Run Activity Log Report			-HLT-BRYAN

System Health Reports

The **System Health** reports have been designed to assist store owners and managers to detect potential problems in the store by analysing information and displaying results that are out of the norm, or that may significantly affect particular areas of the system.

For this document we'll only be looking at the reports that could highlight problems with system security.

Report Types

- **Cashup Health Report:** This report identifies incorrect or incomplete cashups. If there are problems here, it's recommended to rectify them and then checking on your **Cashup Settings** to prevent these problems from occurring again.

AURA: Cashup Health Report COSOFT (KZN TRAINING)

From 01 June, 2016 to 15 June, 2016

Tills that have not been locked or posted

Till Shift	DATE	Locked	Posted	Cashup Total
21,871	13-Jun-2016 03:48PM	No	No	0.00
21,868	03-Jun-2016 08:53AM	No	No	-500.00
21,867	01-Jun-2016 09:40AM	No	No	0.00
Total:				-500.00

Days that do not have a cashup posted

15-Jun-2016
14-Jun-2016
12-Jun-2016
11-Jun-2016
10-Jun-2016
09-Jun-2016
08-Jun-2016
05-Jun-2016
04-Jun-2016

Invoices that were created on a different date to their assigned tillshift

Till Shift:	21,870	Shift Started:	07-Jun-2016 01:16:13PM	Shift Ended:	07-Jun-2016 01:21:15PM
Invoice	Date Created	Total Incl. VAT	VAT	Total Excl. VAT	Overrun Status
927 778	03-Jun-2016 08:56:42AM	154.80	19.01	135.79	No
Total:		154.80	19.01	135.79	
Grand Total:		154.80	19.01	135.79	

Employees that have not been Cashed Up

DRV	Driver 1 Cosoft	DRIVER	Hrs Worked
	Clock In Time	Clock Out Time	

- **Employee Health Report:** This report highlights potential security problems with employees, such as high commissions, and what categories have restricted access to sensitive information.

AURA: Employee Health Report COSOFT (KZN TRAINING)

From 01 August, 2016 to 23 August, 2016

Employees with commission over 15.00%

There are no employees with a commission percent above 15.00%

Active employees that did not work during the selected period

Please review if any of these employees should be marked as inactive

Category	Employee	Last Worked On
Cashier	Waiter 2 Cosoft (WT2)	29-Jul-2016 02:16 pm

Employee categories with restricted access rights

Please make sure that only the Franchisee or Manager employee categories have access to the following restricted access permissions:

	Cashier	Franchisee	MANAGER
To Change VAT Rate		✓	
To Edit An Existing Stock Take		✓	✓
To Edit or Delete an Invoice line	✓	✓	✓
To Edit Posted GRV LineItems		✓	
To Maintain Access Control		✓	
To Over-Ring An Invoice		✓	
To Restrict Employee Categories		✓	✓

- **Stock Health Report:** This reports looks for a number of important stock control information, such as Days missing a stock take and Stock Takes and GRV's edited more than 24 hours after their posting.

AURA: Stock Health Report COSOF (KZN TRAINING)					
From 01 August, 2015 to 23 August, 2015					
Stock recipes with outdated unit costs					
There are no stock recipes with outdated unit costs					
Days missing a stock take					
There are no days missing stock takes					
Stock takes last edited more than 24-Hours of their posting					
There are no stock takes last edited more than 24-hours of their posting					
Stock price changes					
Note: For a more detail please run the Stock Purchase Exceptions or the Stock Price Fluctuations reports					
Category	Stock Code	Stock Item	Minimum Price	Maximum Price	Variance
CHEESE	C-DCC	CREAM CHEESE	60.58	66.08	5.50
CHEESE	C-GCC	CHEDDAR CHEESE	67.47	71.83	4.36
CLEANING	CL010	TIDY WIPE 1500M	140.82	140.87	0.05
MEAT	D-DCG	CHEESE GRILLER	52.79	55.77	2.98

Important Security Settings

Aura has a number of settings relating to access and security on the system. These can be accessed in Invoicing under *Settings*, or in Backoffice under *Preferences > System Settings*. As with Access Permissions, most of these settings will be dependant on the measure of access that the store wants to allow the employees. However it is still important to know that these settings exist and what effect they have.

Blind Cashup

Specific Computer > Invoicing Settings: Prevents the cashup screen from showing the Net Sales, Gross Sales, Credit Cards, GRVs paid from till, or whether the till is over / under. Essentially, the cashier doing the cashup on their own till will enter their cash on hand, their credit cards, and any petty cash payments. This can be set per till.

The screenshot shows the 'Specific Computer' settings window. The 'Invoicing Settings' tab is selected. Under the 'General' section, there are several dropdown menus and checkboxes. The 'Blind Cashup' checkbox is checked. The 'Confirmation Amounts' section shows 'New Customers' at 60 and 'Other Customers' at 120. The 'Local Cashup' section is also visible.

Cashups on tills with Blind Cashup enabled will look like this:

21428	5117	01 Oct 2015	1	01 Oct 2015	AL	MAS	MMU
<							
Till Totals:		OverRings:					
		Gross Sales (Ex O/R):					
		Less Discounts:					
		ADD Delivery Charges:					
		= Net Sales:					
Less:	Coupons (F1)	R 0.00					
	Credit Cards (F2)	R 0.00					
	Cheques (F3)	R 2 258.70					
	Cash On Hand (F4)	R 4 364.90					
	Debtors (F5)	R 0.00					
	Petty Cash (F6)	R 0.00					
	GRV's Paid	R 0.00					
	Employee Wages (F7)	R 298.10					
	Paid Online (Ctrl + F2)	R 532.10					
	Other Payments (Ctrl + F3)	R 0.00					
Add:	Addit. Banking (F8)	R 0.00					
	Driver Floats (F9)	R 0.00					
	Float Issues (F11)	R 0.00					
	Till Float (F10)	R 0.00					
	Gratuities	R 8.10					

Allow Reprint

Specific Computer > Printer Settings: With this option disabled, Aura Invoicing will prevent anyone from re-printing any order's customer and production slip from the current day despite their access level.

The screenshot shows the 'Specific Computer' settings window with the 'Printer Settings' tab selected. The 'Allow Reprint' checkbox is highlighted with a red box. Other settings visible include 'Selected Till', 'Computer Name', 'Till ID', 'Paper Type', 'Copies', and various printing options like 'Print waiter details on slip', 'Print gratuity line', and 'Print Customer Survey'.

Separate Invoicing Passwords

All Computers > Program Settings > General: Allows an employee of manager level or higher to have two separate passwords, one for general use, and a second for Invoicing only. This is useful in a scenario where a manager or franchisee's password may be seen during front of house use and used to access settings or Backoffice.

The screenshot shows the 'All Computers' settings window with the 'Program Settings' tab selected. The 'Enable Separate Invoicing Password' checkbox is highlighted with a red box. Other settings visible include 'General', 'Invoicing', 'Reports', 'Cashup', 'Imaging', 'Stock', 'Search', 'Backup', 'PoleDisplay', 'Picklists', 'Updates', 'Email', 'VAT', 'Program Preferences', 'Report Preferences', and 'Global Print Options'.

The new invoicing password can be set by employee on Page 2 of their employee settings in *Lists > Employee > Employee*:

Force password change every [x] day(s)

All Computers > Program Settings > General: Forces all employees passwords to expire after the set number of days, asking them at that point to enter their current password, and select a new password in order to continue. This is useful as it reduces the likelihood of stolen passwords.

Cashup Settings

All Computers > Program Settings > Cashup: This settings page controls how cashups are handled. The settings under the heading **Tills cannot be LOCKED if** set conditions that must be met before cashups can be completed. It's highly recommended to have these settings always enabled to make sure that your cashups are done properly.

- **Invoices are outstanding** - Check for any orders that have not been paid.
- **Any till shifts are open** - Checks to see if any till shifts are not ended and posted.
- **Drivers are not cashed up** - Checks for any drivers that have not yet been cashed up (posted into an active till shift).
- **One Shop cashup per day** - This ensures that tills cannot be started again once the shop is posted.
- **Cannot open tills if previous days Shop cashup is unposted** - This ensures that the previous day's cashup is properly addressed before new shifts can be started.

Specific Computer **All Computers** Printers

Store Settings | Head Office Settings **Program Settings** | Network Settings

General | Invoicing | Reports **Cashup** | Imaging | Stock | Search | Backup | PoleDisplay | Picklists | Updates | Email | VAT

General Cashup Settings

- ☐ Modify Old Cashups
- ☐ Driver Gets Delivery Charge
- ☒ Force Refresh When Posting

Till Settings

- ☐ Tills Cashed Up Separately
- ☐ Disable Employee Wages
- ☐ Disable Petty Cash

Till cannot be LOCKED if

- ☒ Invoices are outstanding
- ☒ Any till shifts are open
- ☒ Drivers are not cashed up

Shop

- ☒ One Shop cashup per day
- ☒ Cannot open tills if previous days Shop cashup is unposted

These settings can be disabled if necessary as a temporary workaround to cashup issues, but it's always highly recommended that they be enabled again as soon as the cashup problems are resolved.

Useful Control Tools

Through the use of our **SMS Agent** and **Report Scheduler** applications, Aura provides you with a way to keep track of activity of your store without being on site, either by sending SMSes when particular activities happen, or by sending reports to your email address at scheduled intervals.

SMSAgent

SMS Agent is an auxiliary service to the Aura POS that uses pre-configured **Agents** to send SMSes with relevant information under certain conditions, such as when a particular activity occurs, or at set times. If you plan to use SMS Agent, it's highly recommended to read through the product manual available [Here](#) or on the Aura website.

SMS Agent comes with default agents that you can configure quickly to alert you for **Discount** and **OVERRING** activities. Consult the manual or contact the Aura helpdesk to for assistance in how to set them up.

Report Scheduler

Report Scheduler is a service that allows you to generate and send Aura reports to your email address according to a specific schedule. You can use this to get daily updates from the Discount Summary or Overring Summary reports, or to monitor daily activity, or even get the daily stock variance.

Creating schedules to your needs is a once-off process per store. Consult the Report Scheduler product manual [Here](#) or on the Aura website or contact the Aura helpdesk to for assistance in how to set them up.

Office Contact Details

Aura Helpdesk

0860 994 155

support@cosoft.co.za

www.cosoft.co.za/support

Aura Helpdesk Hours

6:00am to 11:00pm, 7 days a week



In order to ensure that all calls taken have been logged and are treated with the importance and urgency each one rightfully deserves, please keep the following points in mind when consulting with our helpdesk:

- Ensure that the technician you are speaking to knows which store you are calling from, and that you get the name of the technician you speak to.
- Be clear and concise with what the problem is and when it started appearing. The more information you can provide, the better.
- If the technician does not offer you a reference number for your call, you should ask them for one. Not only does this makes it easier to follow up on the status of the issue later, but also ensures that your call is logged in our system and is being / has been attended to properly.
- Most importantly, please keep in mind that CoSoft provide the Aura Point of Sales Suite; for any other problems such as your email, internet, anti-virus software and the like, please contact the software distributor or supporter related to that application. These contact details can generally be found under the application's *Help > About* or *Help > Contact Us* options.

Guide Author: Bryan Alborough
balborough@cosoft.co.za
