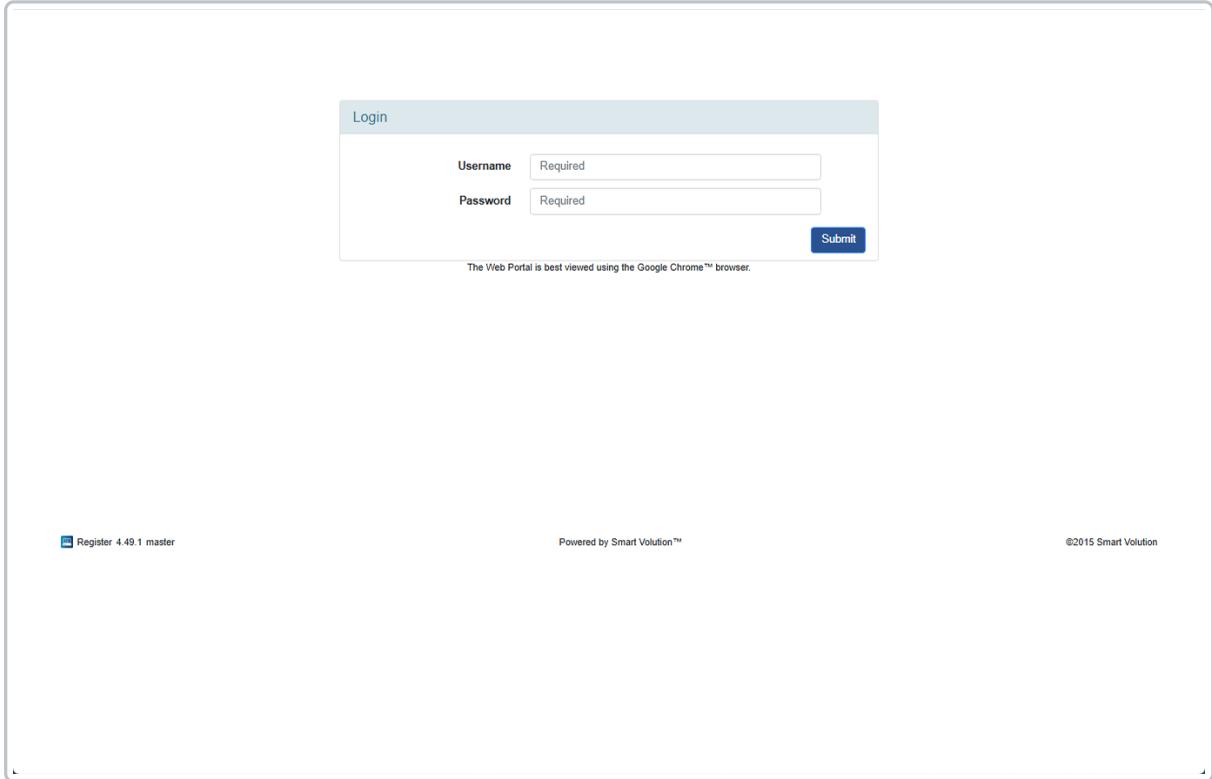


How to manage Staff Members in the Web Portal

Last Modified on 07/07/2025 2:30 pm BST

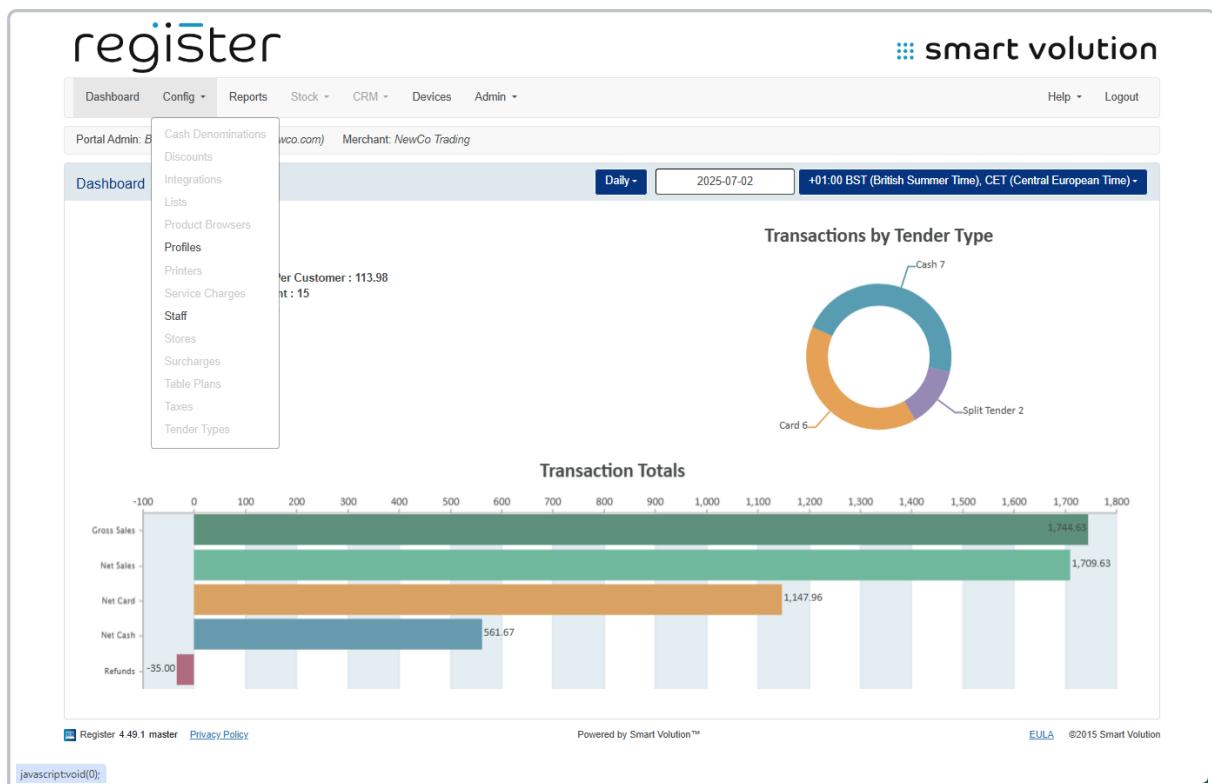
Want to manage staff from your computer? It's easy to do in the Web Portal! Here's how:

1. Log in to the **Web Portal** using the login details from your **Solution Provider**.

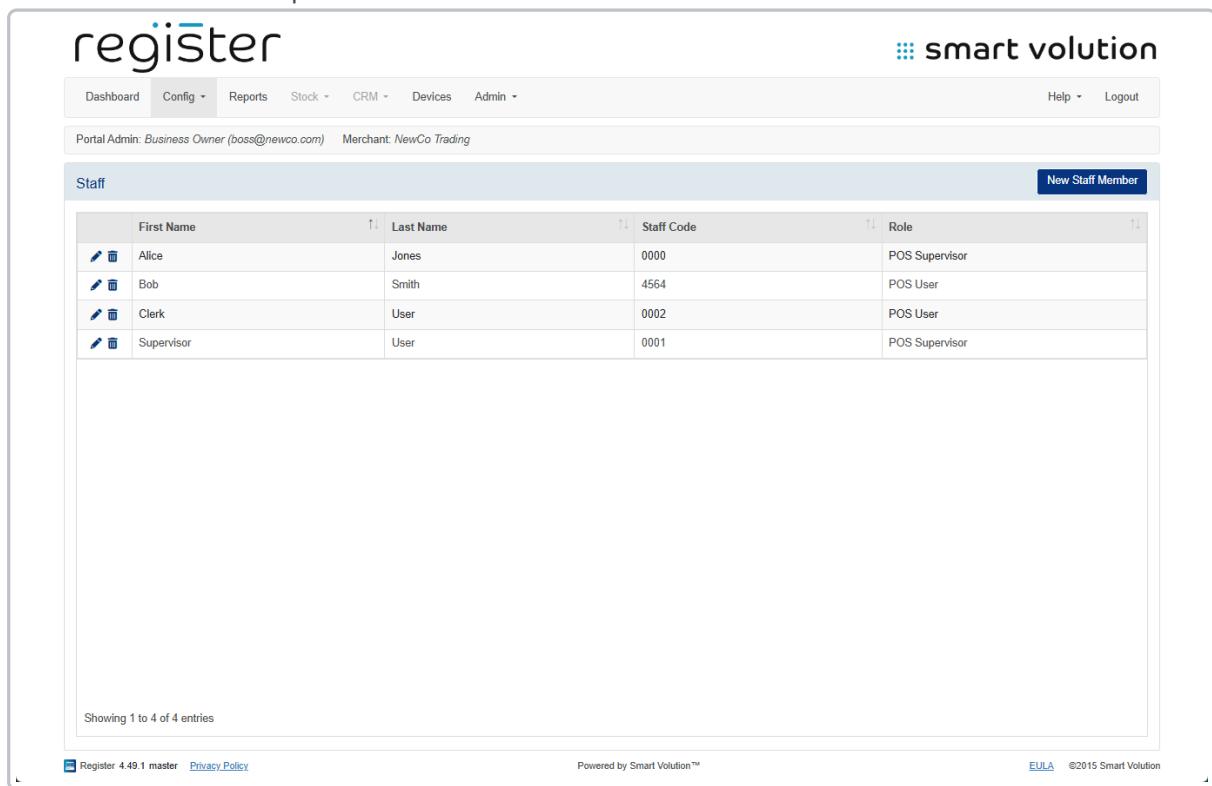


The screenshot shows the login interface of the Web Portal. At the top, there is a header bar with the text 'Smart Volution' and 'Smart Volution' in a smaller font. Below the header is a 'Login' form. The form has two input fields: 'Username' and 'Password', both marked as 'Required'. A 'Submit' button is located to the right of the password field. Below the form, a note says 'The Web Portal is best viewed using the Google Chrome™ browser.' At the bottom of the page, there are three links: 'Register 4.49.1 master', 'Powered by Smart Volution™', and '©2015 Smart Volution'.

2. Once you're in, click **Config** in the top menu.



3. Then click **Staff** in the dropdown.



2 You'll now see a table with all your staff members. From here, you can:

- **Add a new staff member:**

Click **New Staff Member**, fill in the details, then click **SAVE**.

Portal Admin: Business Owner (boss@newco.com) Merchant: NewCo Trading

Staff Member

First Name Required

Last Name Required

Staff Code

Role POS User

Cancel Save Save & Add Another

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- **Edit an existing staff member:**

Click the pen icon  next to their name, make your changes (name, code, or role), and click **SAVE**.

Portal Admin: Business Owner (boss@newco.com) Merchant: NewCo Trading

Staff Member

First Name Alice

Last Name Jones

Staff Code 0000

Role POS Supervisor

Cancel Save

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- **Delete a staff member:**

Click the trash can icon  next to the staff member you want to remove. A message will pop up—click **Yes** to confirm.

The screenshot shows the Register software interface. At the top, there is a navigation bar with links for Dashboard, Config, Reports, Stock, CRM, and a user account. Below the navigation bar, a sub-menu for 'Staff' is open, showing a list of staff members with columns for First Name, Last Name, and Staff Code. A modal dialog box titled 'Delete Staff' is displayed, asking for confirmation to delete a staff member named 'Bob Smith' (Staff Code 4564). The dialog includes a note stating that all appointments allocated to this staff member will still be accessible. At the bottom of the dialog are 'No' and 'Yes' buttons, with 'Yes' being highlighted in blue. In the top right corner of the main interface, the 'smart solution' logo is visible, along with 'Help' and 'Logout' links. A 'New Staff Member' button is located in the top right of the staff list area. The footer of the page includes links for 'Register 4.49.1 master', 'Privacy Policy', 'Powered by Smart Solution™', 'EULA', and a copyright notice for 2015.



Please Note:

⌚ All changes made here will sync to your devices the next time you tap **Update Data** on the login screen.