

# Add/Update a Cashier Configuration

**Purpose:** Use this document as a reference for adding valid cashiers and tender types in ctcLink.

**Audience:** Student Financials supervisor.

 You must have at least one of these local college managed security roles:

- ZC SACR SF Cashiering Config
- ZZ SACR SF Cashiering Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

 If your college has a:

- New employee who will be a cashier
- Need to update a cashier access
- Or need to remove access to a current cashier...

please refer to the steps below.

For new cashiers, remember to set appropriate security. Each step must be completed for new cashiers.

## 1. Add/Update a Cashier in SACR

**Navigation:** Setup SACR > Product Related > Student Financials > Cashiering > Valid Cashiers

1. The Valid Cashiers search page displays.
  - A. To find/update an existing cashier, on the **Find an Existing Value** tab, enter the **EMPLD ID** in the **Cashier** field and select the **Search** button.
  - B. To add a new cashier, select the **Add a New Value** tab to add a new Cashier.
    - I. Enter the **Business Unit**.
    - II. Enter the **Cashier's Office**.
    - III. Enter the **Cashier** EMPLID.

IV. Select the **Add** button and the Valid Cashiers page displays.

2. Select the **Supervisor** checkbox if the user will be a cashiering supervisor. If the user will not be a supervisor, enter the **Supervisor Operator ID**.
3. Select the **Department Only Cashier** if the user will only be processing **Department Receipt** payments.
4. If you want receipts to be printed after payment processing, in the **Print Receipt Automatically** section, select the:
  - A. **Student Payment** checkbox.
  - B. **Corporate Payment** checkbox.
  - C. **Department Receipt** checkbox.
5. In the **Valid Cash Registers** section, enter the **Register(s)** this cashier will have access to use in this Cashier Office. You can add multiple registers by selecting the **Add a New Row** **[+]** button and entering additional registers.
6. Select the **Save** button.
7. Section complete.

- 💡 To remove a register from the cashier, select the **Remove a Row [-]** button.
  - To delete a cashier, select the **Delete Cashier** button on the top right corner of the page.

- 📘 After the cashiers are assigned to the new office, contact your college Security Administrators to assign cashiers Student Financials Row Level Security and to run the Set Security Process. This will allow the cashiers to see the new office in their drop-down list.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to [Create/Update Cashier](#). This link will open in a new tab/window.

## 2. Assign/Update Tender Key Valid Cashiers

! You must have at least one of these local college managed security roles:

- ZC SACR SF Cashiering Config
- ZZ SACR SF Cashiering Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: Setup SACR > Product Related > Student Financials > Cashiering > Tender Keys**

1. The **Tender Keys** search page displays.
2. Enter the **Business Unit** and select **Search**.
3. Select the **Tender Key** link that the cashier should have access to and the Tender Key tab displays.
4. Select the **Tender Key Valid Cashiers** tab and the Tender Key Valid Cashiers tab displays.
5. In the **Tender Cashiers** section, if this is not a new **Tender Key**, select the **Add a New Row** **[+]** button to add a new **Effective Dated** row.
6. In the **Cashier Details** section:
  - A. To assign a cashier to a tender, in the **Cashier Details** section, select the **Add a New Row** **[+]** button.
    - I. Enter the **EMPLID** in the **Cashier** field.
    - II. Select the **In Allowed** and **Out Allowed** checkboxes.
  - B. To remove a cashier from a tender, in the **Cashier Details** section, select the **Remove a Row** **[-]** button on the appropriate row.
7. Select the **Save** button.
8. Select the **Return to Search** button and select any other tenders that the cashier(s) should/ not have access to and repeat the steps above.
9. Section complete.

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View the external link to [Assign/Update Tender Key Valid Cashiers](#). This link will open in a new tab/window.

## 3. Add a Cashier to a Cashier Office

❗ You must have at least one of these local college managed security roles:

- ZZ SF Head Cashier


If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

⚠ To add a new cashier, you can only add the cashier to an Open Cashier's Office. Please refer to the [Opening a Cashier's Office](#) QRG.

### Navigation: Student Financials > Cashiering > Cash Management > Open Offices

1. The Open Cashier Offices search page displays.
2. Enter **Business Unit** and select the **Search** button.
3. Select the appropriate **Cashier's Office** link and the Open Cashier Offices tab displays.
4. Select the **Open Cashiers** tab and the Open Cashiers tab displays.
5. In the **Cashiers** section, select the **Add a New Row [+]** button.
  - A. Enter or search for the **Cashier EMPLID**.
  - B. Enter or search for the **Register**.
6. In the **Tender Details** section, enter or search for the **Tender Key**.

- A. Select the **Add a New Row [ + ]** button to add additional **Tender Key(s)**.
7. Select the **Open** checkbox in the **Cashiers** section.
8. Select the **Save** button.
9. Process complete.

 If "No matching values were found" for the cashier, ensure that the Open Registers tab has the appropriate register opened that the cashier has been assigned to in SACR.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to [Add a Cashier to a Cashier Office](#). This link will open in a new tab/window.