How to Create a Custom Role for Your Staff

What Is This?

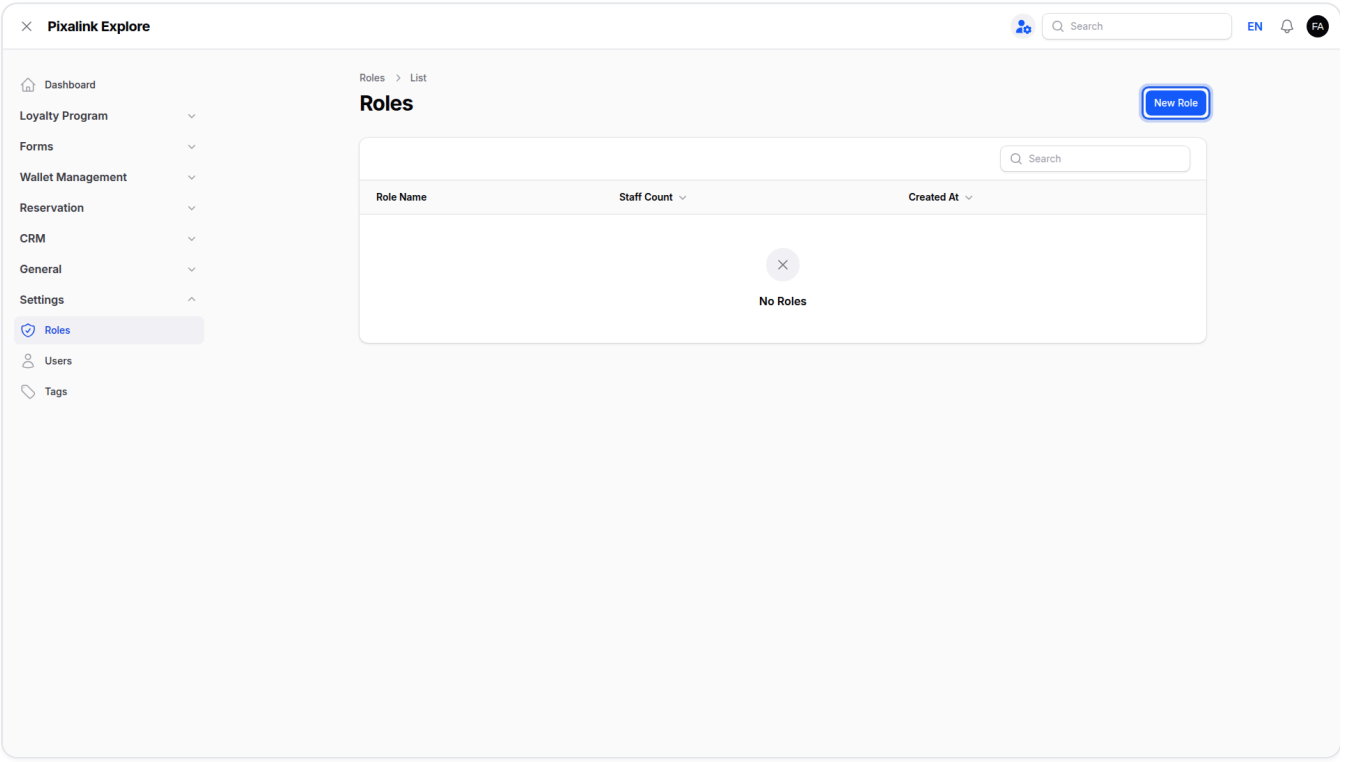
Give each staff member only the screens they need, so fewer mistakes happen and your business data stays safe. A custom role does this for you. Your cashier can give points without opening your billing, and your marketing helper can send campaigns without touching rewards.

Real-Life Example

Wei Lin runs a cafe and just hired Lim Wei Jie as a part-time cashier. Every new staff login got full access, so Wei Jie could see billing, campaigns and the whole customer list. Wei Lin only wanted him to give points and use customer rewards at the counter. She made a role called "Cashier" from the **Staff - Points Only** template and gave it to Wei Jie. Now his menu shows only **Dashboard**, **Record Points**, **Point History** and **Top Up Credits**. He learnt the screens in ten minutes, and Wei Lin no longer worries about wrong clicks.

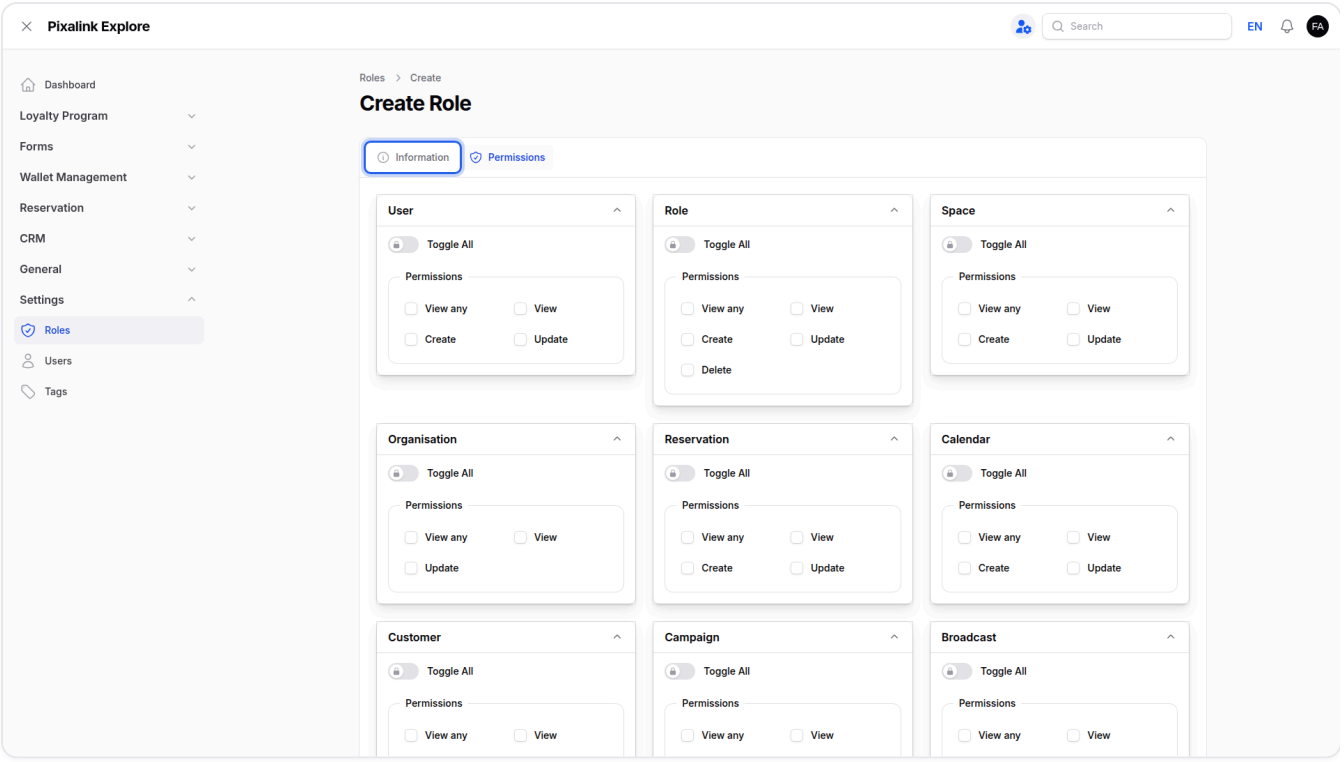
How to Set It Up

1. Go to **Settings → Roles** and click **New Role**.



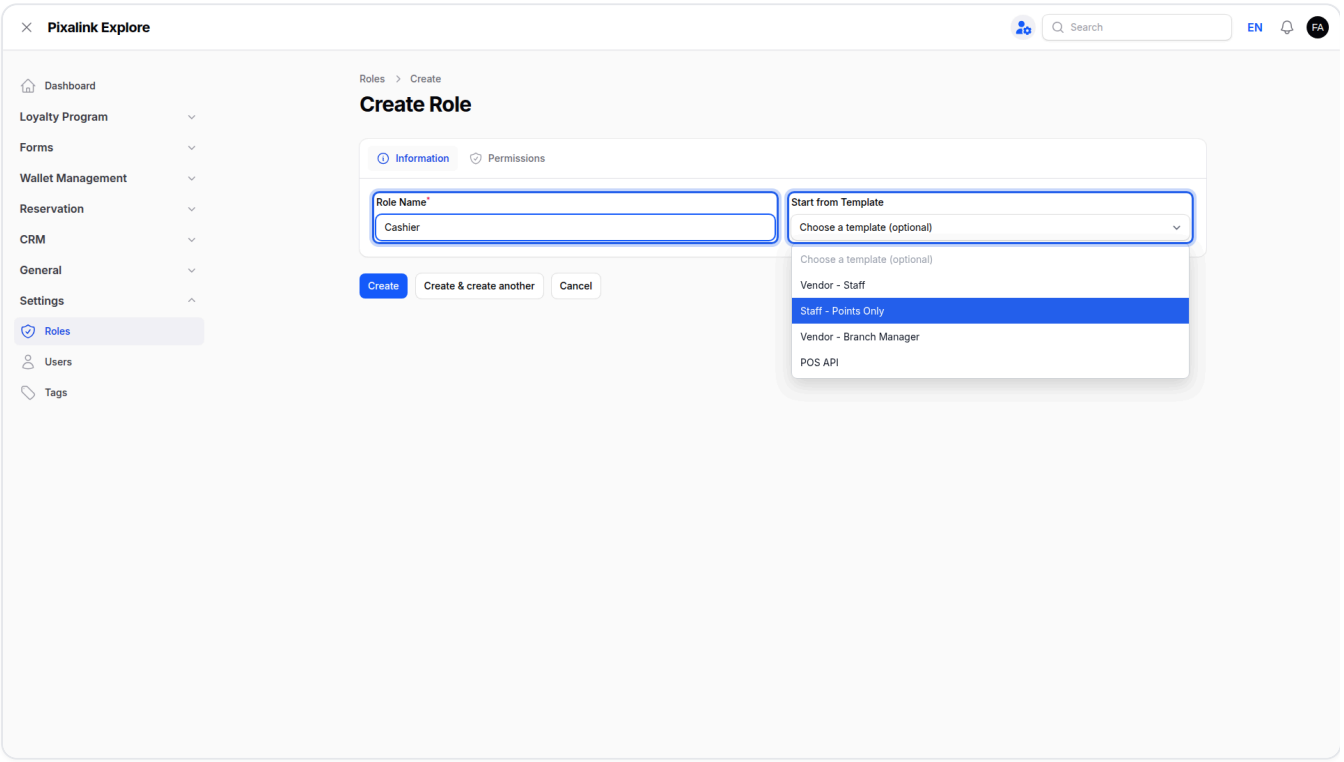
The page lists only the roles you made yourself. It's empty the first time.

2. Click the **Information** tab.



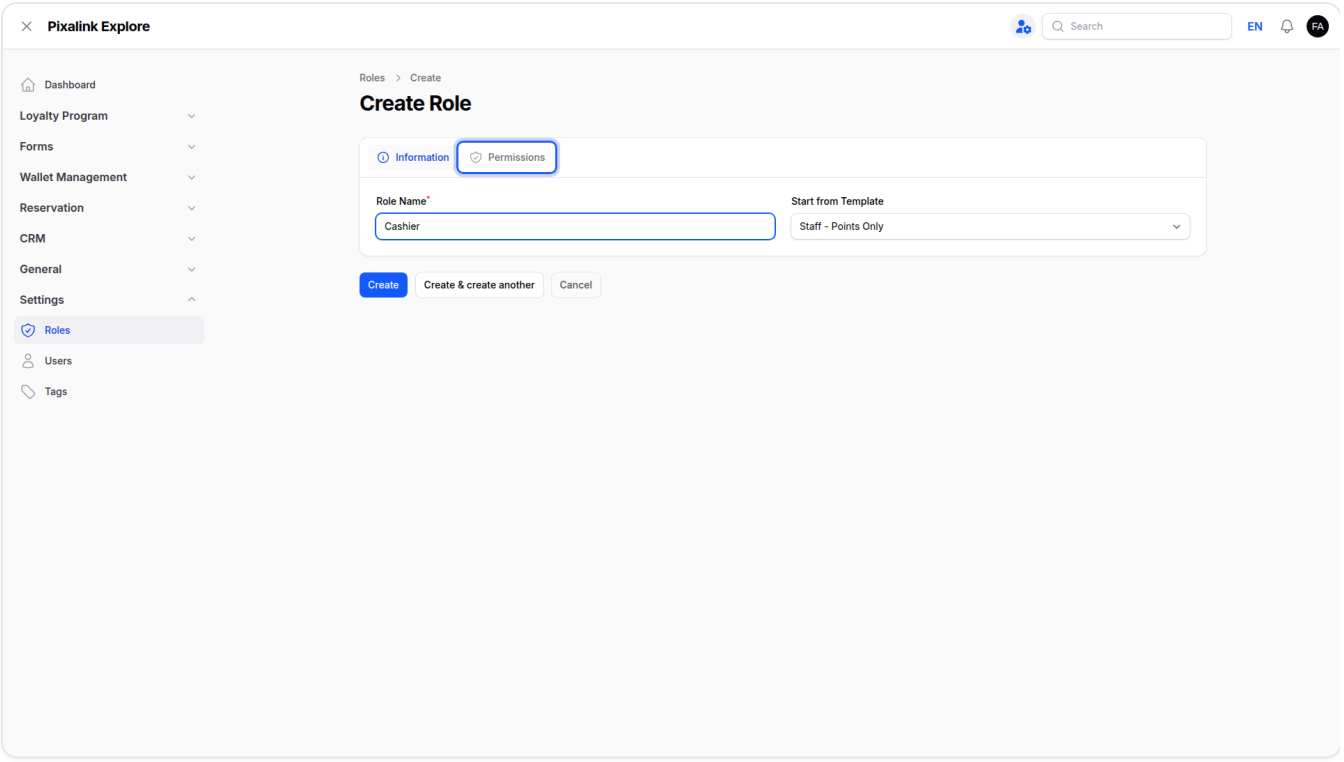
The page opens on Permissions. Start on Information to name the role.

3. Type a **Role Name**, then pick a **Start from Template** if one fits.



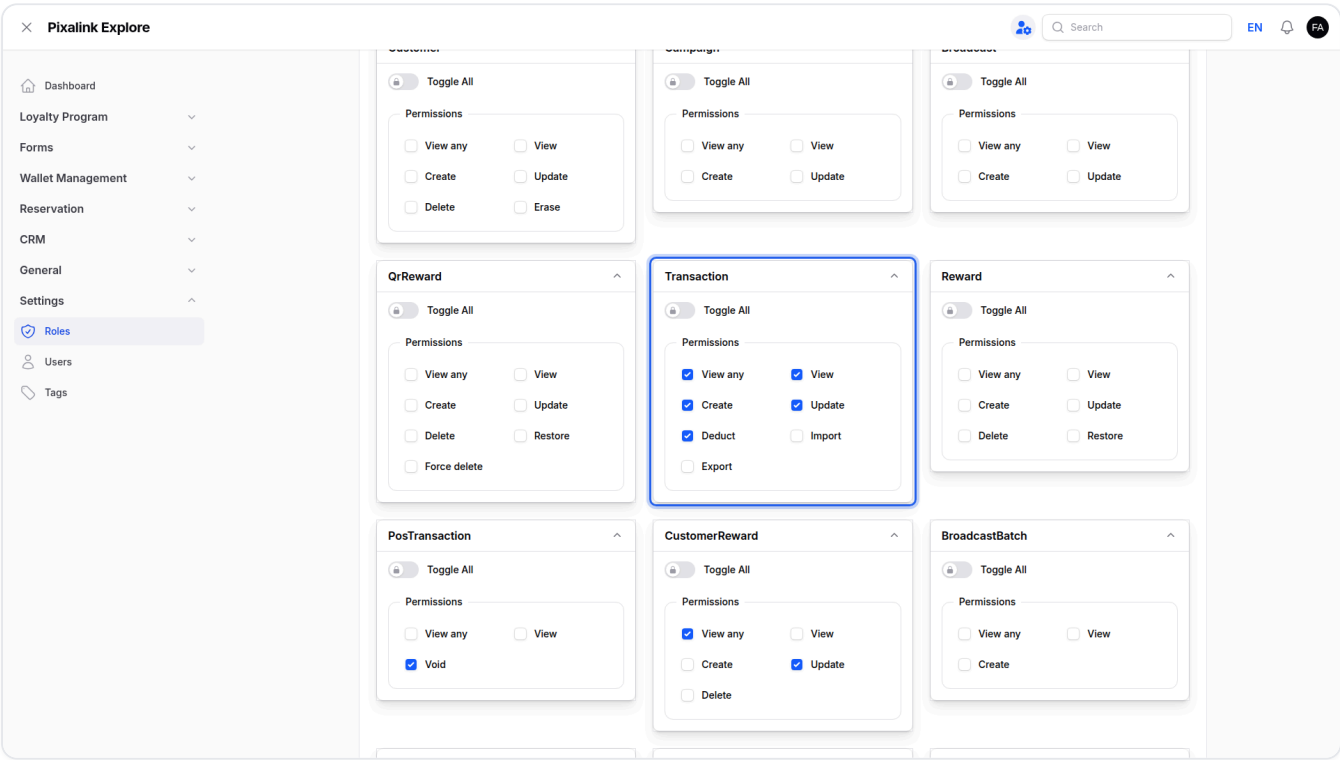
A template ticks the right boxes for you. You can still change them.

4. Click the **Permissions** tab.



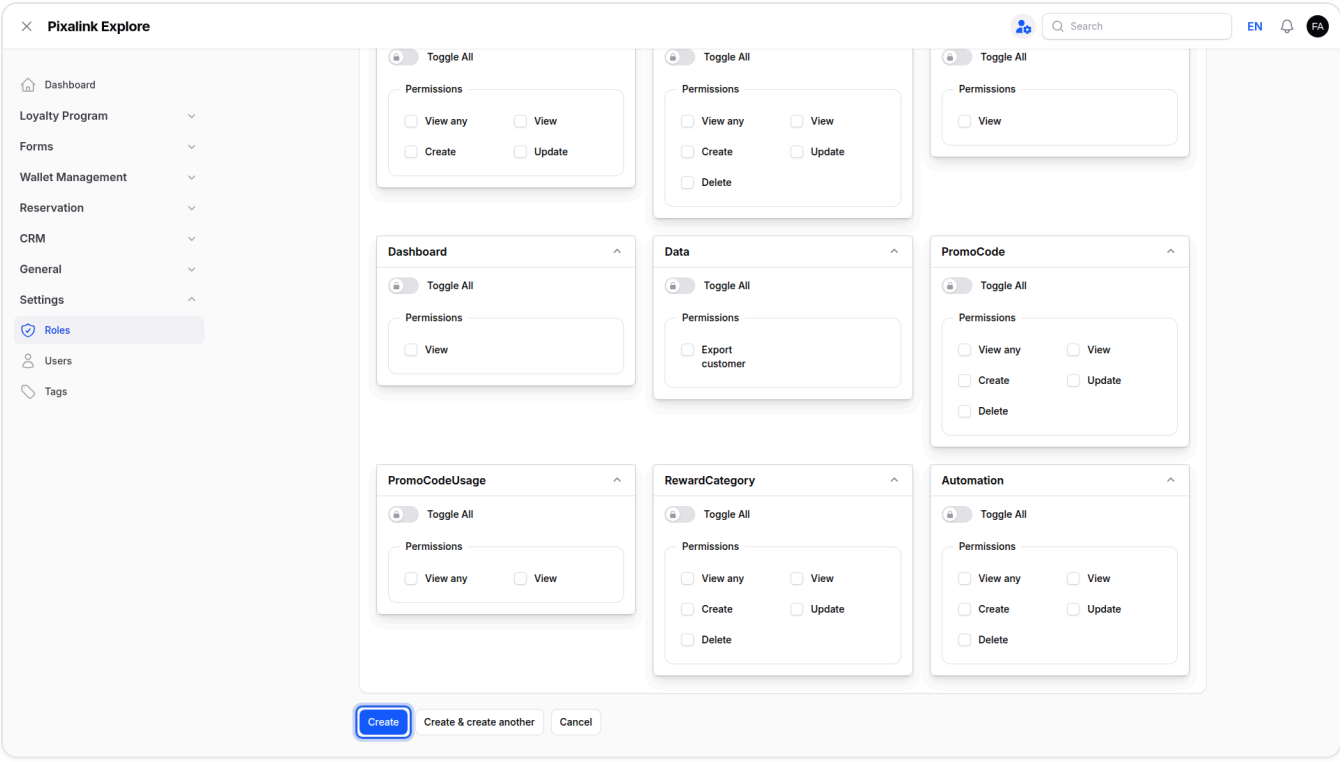
Each box on this tab is one area of the Admin Panel.

5. Tick the boxes this role needs, or turn on **Toggle All** to give a whole section.



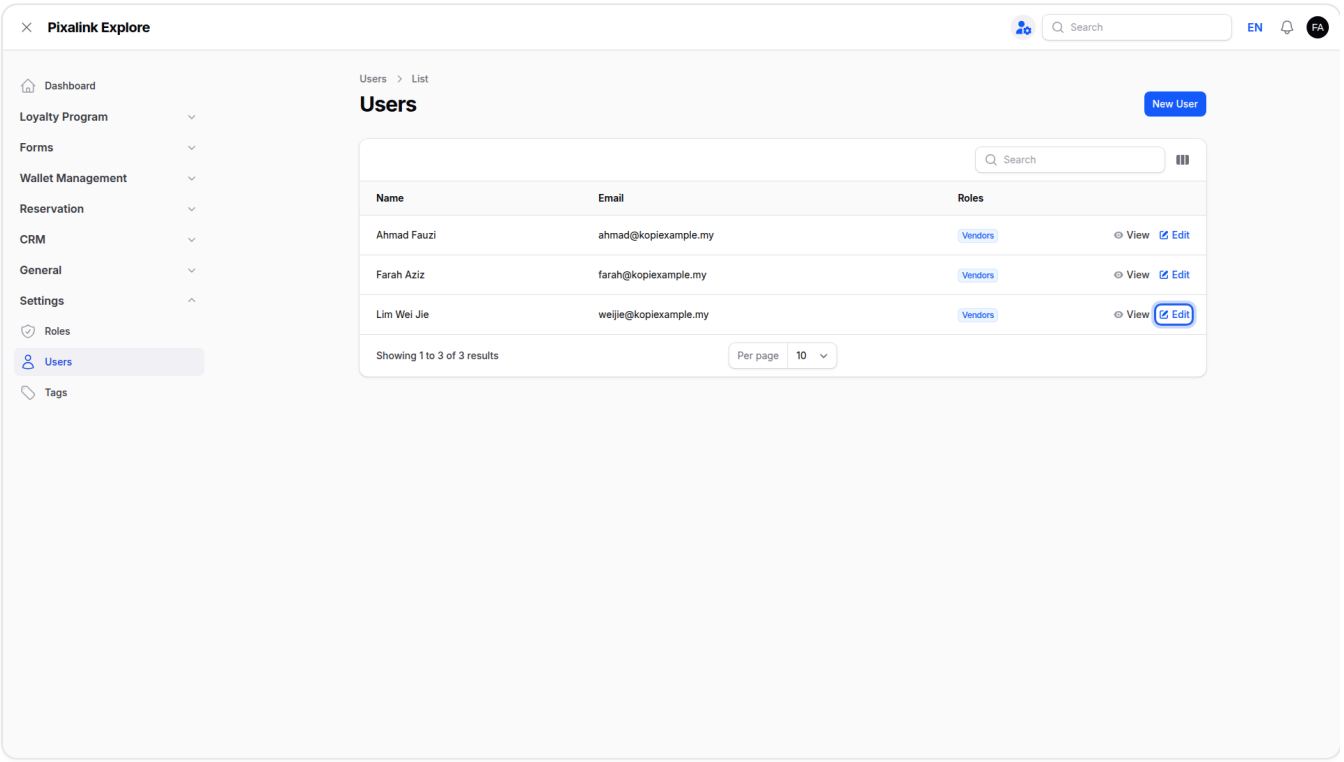
Here the template has ticked the point boxes in Transaction. See the tables below for every section.

6. Click **Create**.



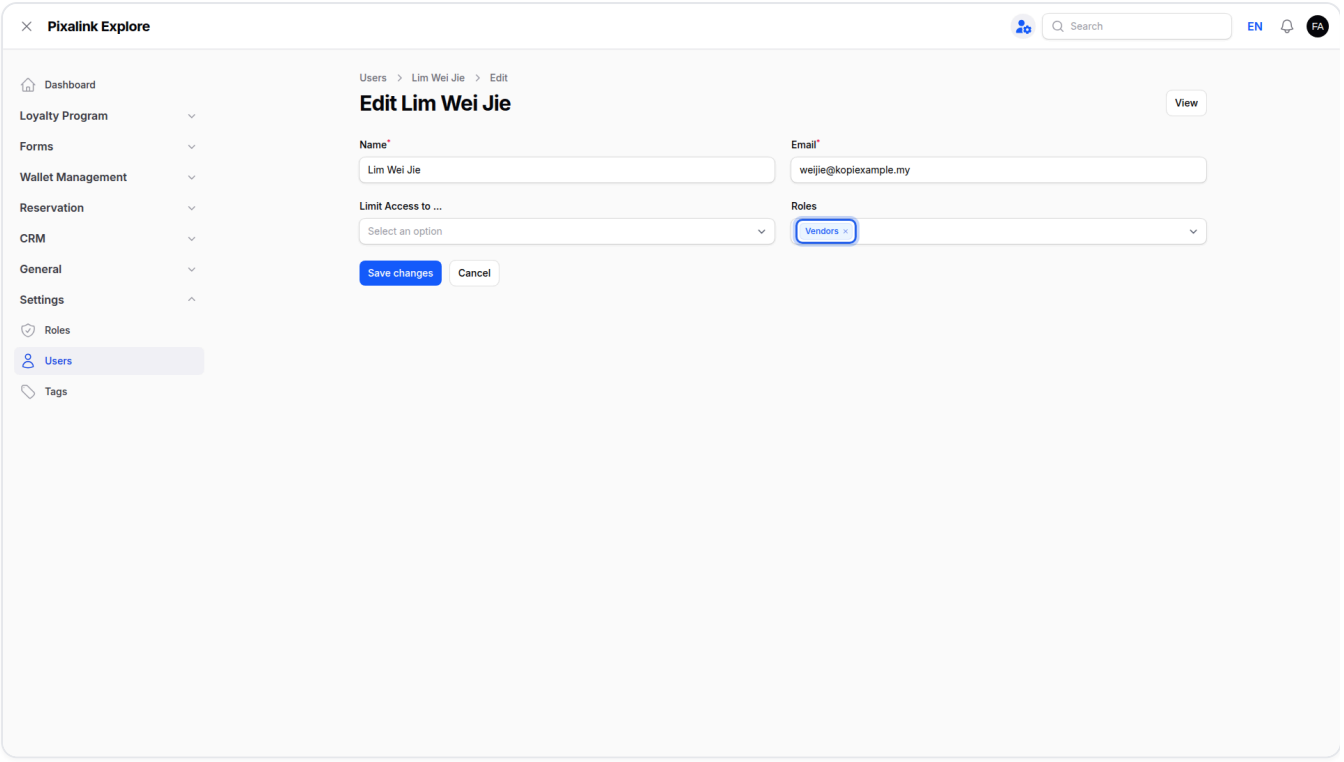
Create is at the very bottom, under the last section.

7. Go to **Settings → Users** and click **Edit** next to the staff member.



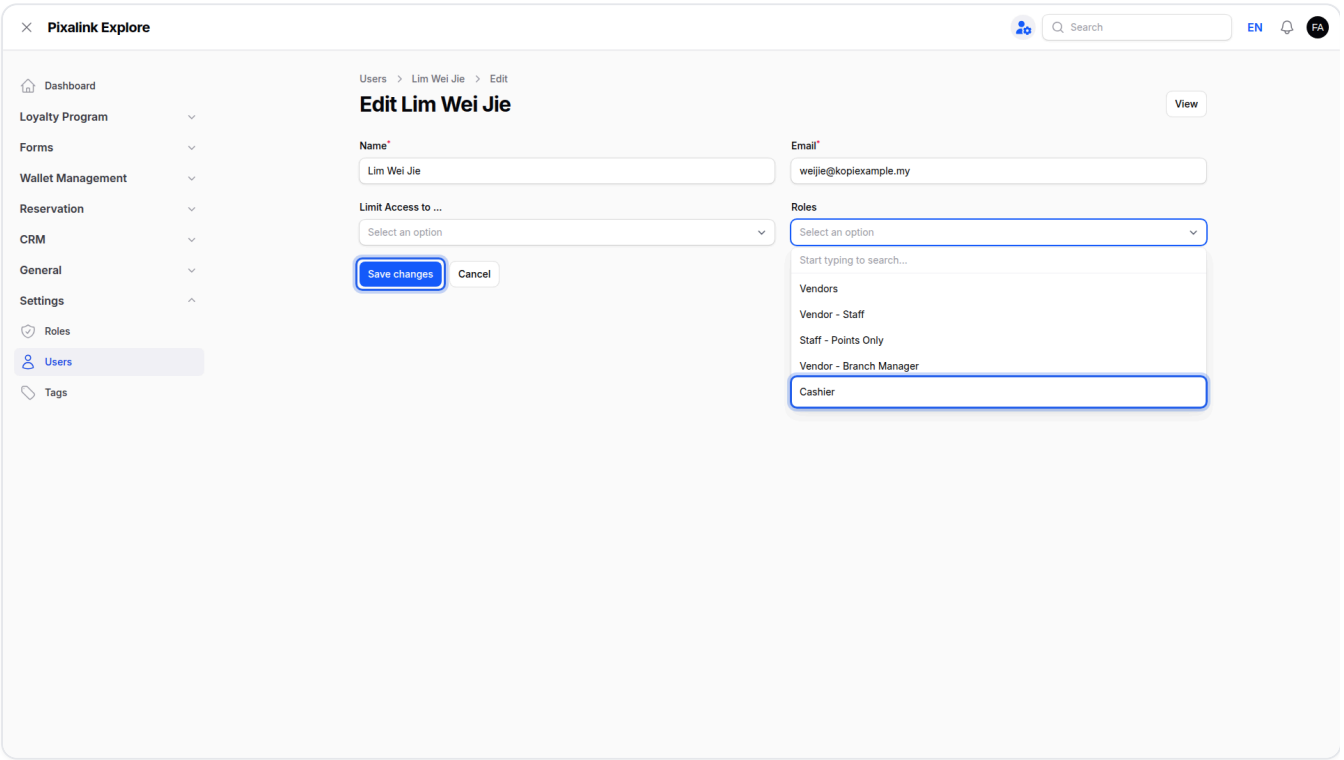
The Roles column shows each person's current role.

8. In **Roles**, click the **×** next to **Vendors**.



Each staff member holds one role, so remove the old one first.

9. Pick your new role from the list, then click **Save changes**.



Your own roles are listed together with the built-in ones.

The Built-In Roles

You can give these to staff without making your own role. You can't change their boxes.

Role	What it's for
Vendors	Full access to every section below. New staff get this when you leave **Roles** empty.
Vendor - Staff	Counter staff: give points, give and use rewards, take reservations, top up credits.
Staff - Points Only	Cashiers: give and take away points, and use customer rewards.
Vendor - Branch Manager	Outlet managers: customers, reservations, calendars and outlet details, plus points and rewards.

The last template in the **Start from Template** list is for connecting a POS terminal. Don't use it for a staff role.

What Each Box Means

Every section has the same kinds of boxes:

- **View any** shows the menu and the list.
- **View** opens one item to see its details. Tick it with **View any**.
- **Create** adds new items.
- **Update** edits items.
- **Delete** removes items. **Restore** brings deleted ones back. **Force delete** removes them for good.

Customers and Points

Section	Where it is	Extra boxes
Customer	CRM → Customers	**Erase** opens Settings → Data Requests and approves a customer's request to delete their data.
Transaction	Loyalty Program → Point History and Record Points	**Create** gives points. **Deduct** shows the Deduct Point button, and **Import** adds the upload, bulk deduct and bulk reward buttons, and **Export** adds the download button, when these are turned on for you.
CustomerReward	Rewards a customer holds	**Update** uses (validates) a reward. **Create** gives one to a customer.
Credit	Wallet Management → Top Up Credits and Credit History	**Create** tops up credits.
PosTransaction	Loyalty Program → POS Transactions	**Void** lets a connected POS terminal cancel a receipt.
PosCredit	Wallet Management → POS Credits	
EcommerceTransaction	Loyalty Program → Ecommerce Transactions	
Payment and **Folio**	Tabs on a customer's page	
Data	Settings → Data Requests, when turned on	**Export customer** approves a request for a copy of a customer's data.
Feedback	Loyalty Program → Feedbacks	
Tag	Settings → Tags	

Rewards and Loyalty

Section	Where it is
Reward, **RewardVoucher**	Loyalty Program → Rewards, and the voucher codes inside a reward
RewardCategory	Loyalty Program → Reward Categories
RewardBundle, **RewardBundleItem**	The **Manage Reward Bundles** button on Loyalty Program → Rewards (when turned on), and the items inside
QrReward	CRM → Scan & Share
PromoCode, **PromoCodeUsage**	Loyalty Program → Promo Codes, and who used each code
TierConfiguration, **Tier**	Loyalty Program → Tier Configurations, and the tiers inside
PaidMembershipType	Loyalty Program → Paid Memberships
ReferralConfiguration, **Referral**, **ReferralItem**	Loyalty Program → Referral Configurations, its referrals and its rewards
StampCampaign	Loyalty Program → Stamp Campaigns

Marketing and Your Portal

Section	Where it is
Campaign, **Broadcast**	CRM → Campaigns, and the messages each one sent
BroadcastBatch	CRM → Broadcast Batches
Automation	CRM → Automations
NewsFeed	Loyalty Program → News Feeds
CustomerPortalTheme	Loyalty Program → Customer Portal Design
Form, **FormSubmission**	Forms → Forms, and the answers people sent

Reservations and Ordering

Section	Where it is
Reservation	Reservation → Reservations
Calendar	Reservation → Calendars
ReservableUnit	Reservation → Tables
Order	Ordering → Orders and Subscriptions
Product, **ProductCategory**	Ordering → Products and Product Categories

Your Business and Settings

Section	What it unlocks
Dashboard	**View** shows the figures on the Dashboard.
Organisation	**Update** opens business details, billing, notification settings, WhatsApp templates, top-up settings and CRM → Pixalink SMS Credits.
Configurations	**View** opens the change history pages, and Settings → Configurations once WhatsApp is set up.
Space	General → **Spaces** (your outlets).
User	Settings → **Users**.
Role	Settings → Roles.
FolioConfiguration	Settings → Folio Configurations.
WebhookConfiguration, **PersonalAccessToken**	Links to other systems. These only show when turned on for your business.
AutoTaggingConfiguration	Not used any more. You can leave it off.

What Your Customers Will See

Nothing changes for your customers. Roles only change what your staff see in the Admin Panel.

Good to Know

- Each staff member has one role. Remove the old role before you pick a new one.
- You can't change your own role. Another staff member with access to **Users** must do it.
- Changing a role's boxes changes them for every staff member with that role.
- You can't delete a role while staff still use it. Move them to another role first.
- Roles decide what staff can do. **Limit Access to ...** decides which outlets they see. Use both together.
- **StampCampaign**, **WebhookConfiguration** and **PersonalAccessToken** only show when that feature is on for your business.

Need Help?

If you don't see **Roles** under **Settings**, ask the Pixalink team to turn on custom roles for your business.

What's Next?

- How to Invite Your Team and Manage Roles (https://kb.pixalink.io/articles/how-to-invite-your-team-and-manage-roles-v2)

- How to Give Staff Access to Only Their Outlet (https://kb.pixalink.io/articles/how-to-give-staff-access-to-only-their-outlet)
- How to Check Who Issued or Modified a Customer's Points (https://kb.pixalink.io/articles/how-to-check-who-issued-or-modified-customer-points)