

Guide for the administrator

Guides by job role

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Guides by job role

Guide for the administrator

Keep users, access, printouts and the system healthy, and know when to call support.

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Your role

You make sure the right people can do the right things, documents look professional and problems are fixed quickly. You are the first person staff ask when something goes wrong.

When staff join or leave

- Create users and assign roles. See Creating users and assigning roles.
- Use Example access setups as a starting point.
- **Disable** leavers on the day they go. Do not delete them.

Every week

- Read the **Error Log** and **Email Queue** for problems. See Backups, logs and security.
- Answer staff questions with Troubleshooting and the Missing modules or permissions article.

When the business changes

- New document layout or logo: Print formats and letterheads.
- A new detail on a form: Custom fields and forms.
- An approval step or alert: Workflows and notifications.
- A change in invoice numbering: Document numbering. Talk to the accountant first.
- Importing data: Importing data.

Every quarter

- Review all users and roles. Remove what is not needed.
- Check outgoing email is working. See Email problems.
- Check your Hesabu ERP invoice is paid on time. See Your plan and your Hesabu ERP invoices.

Keep it safe

- Use strong, different passwords. Never share administrator logins.
- Give integrations their own users and keys. See API keys and webhooks.

When to contact support

For anything about the server, backups and restores, plan changes or a suspected security problem. Call or WhatsApp us, with your workspace address.

Common mistakes

- Giving everyone the System Manager role to avoid access problems.
- Changing settings with no note of what or why.

Related documentation

- Creating users and assigning roles
- Permissions and restricting access
- Print formats and letterheads
- Backups, logs and security