

Example access setups

Users and access control

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Practical role combinations for an accountant, salesperson, storekeeper, branch manager and owner.

Beginner · About 8 minutes · Version 1.0 · Updated 17 November 2026

Overview

These examples show how a small business can split access sensibly. Adjust them for your own team.

Examples

Person	Roles	What they can do	Restrictions
Owner	System Manager, Accounts Manager	Everything, including approving and reports	None
Accountant	Accounts User	Enter invoices, payments and journals, run reports	Cannot manage users
Sales person	Sales User	Quotations, orders, customers	Cannot see purchase or payroll data
Storekeeper	Stock User	Receipts, delivery notes and transfers	User Permission on their warehouse only
Branch manager	Sales User, Stock User	Day-to-day for one branch	User Permission on their warehouse and cost centre
HR officer	HR User	Employee records and leave	Cannot see accounting

Practical example

Kamau, the storekeeper in Nakuru, can receive goods and issue stock, but cannot see invoices, prices that are not on his documents, or payroll. When he receives cement, the delivery is recorded under his own name, which gives a clear audit trail.

Important notes

- **Separate the jobs** where possible: the person who raises a payment should not also approve it. You can enforce approvals with a workflow. See Workflows and notifications.
- Review your users every few months and remove anyone who no longer needs access.

- Audit what users did by opening a record and reading its **Activity** section, or by searching for **Activity Log**.

Common mistakes

- Giving the owner's login to a manager, so there is no trace of who acted.
- Leaving accounts of former staff enabled.

Next steps

Move on to Accounting.

Related documentation

- Creating users and assigning roles
- Permissions and restricting access