Creating users and assigning roles

Users and access control

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Creating users and assigning roles

Add team members, give them roles, disable accounts and understand what each role allows.

Beginner · About 12 minutes · Version 1.0 · Updated 17 November 2026

Overview

Every person who uses your workspace should have their own **user**. A user's **roles** decide which modules they can open and what they can do. Giving each person only the access they need keeps your data safe.

Prerequisites

You must have the **System Manager** role.

Steps

Add a user

1. Search for **User** and click **Add User**.
2. Enter the person's **Email** and **First Name**.
3. Leave **Send Welcome Email** ticked so they get a link to set their password.
4. Click **Save**.
5. In the **Roles** section, tick the roles they need. See the table below.
6. Click **Save** again.

Disable or enable a user

1. Open the user.
2. Untick **Enabled** to disable, or tick it to re-enable.
3. Save. A disabled person can no longer sign in, but their past work remains in the records.

Common roles

Role	Typical use
System Manager	Administrator. Full access, including users and settings
Accounts Manager	Senior accountant. All accounting functions
Accounts User	Accountant or bookkeeper. Enter invoices and payments
Sales Manager / Sales User	Manage or record sales
Purchase Manager / Purchase User	Manage or record purchases
Stock Manager / Stock User	Manage or record stock
HR Manager / HR User	Employee records, leave and payroll

Practical example

The owner adds Wanjiru as an **Accounts User**, Kamau as a **Stock User** and Aisha as a **Sales User**. Each sees only their own modules in the sidebar.

Important notes

- Do not give System Manager to everyone. Keep it to one or two administrators.
- Remove access the day someone leaves. Disable the user, do not delete them, so the audit trail stays intact.
- Share the workspace address with new users. See Signing in to your workspace.

Common mistakes

- Sharing one login between several people.
- Giving a Manager role when a User role is enough.

Troubleshooting

If a new user says a module is missing, check their roles. See Missing modules or permissions.

Next steps

Read Permissions and restricting access.

Related documentation

- Permissions and restricting access
- Example access setups

- Updating your profile and password