

# Permissions and restricting access

## Users and access control

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# Permissions and restricting access

Control what each role can do on each document type, and limit users to specific companies or records.

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## Overview

Access in Hesabu ERP works in two layers:

1. **Role permissions** say what a role can do with a document type: read, write, create, submit, cancel, delete, export, print, email.
2. **User permissions** narrow a user down to specific records, such as one company, one warehouse or one customer.

## Steps

### See and change role permissions

1. Search for **Role Permissions Manager** and open it.
2. Choose a **Document Type**, for example *Sales Invoice*.
3. The table lists each role and what it may do. Tick or untick the boxes.
4. Click **Update** (the change takes effect immediately for new sessions).

### Restrict a user to certain records

1. Search for **User Permission** and click **Add User Permission**.
2. Choose the **User**.
3. Choose the **Allow** document type, such as *Company* or *Warehouse*, and the **For Value**, such as `Stores - MHB`.
4. Tick **Apply to all Document Types** if the restriction should apply everywhere, then Save.

## Practical example

Tabitha manages the Eldoret shop. The administrator adds a **User Permission** for her user: *Warehouse* equals `Eldoret Shop - MHB`. She now sees stock for her shop only, and invoices linked to it.

## Important notes

- **Submit** and **Cancel** are separate permissions. Give them only to people who should post and reverse transactions.

- Sensitive fields, such as salaries, can be hidden using **permission levels**. Ask your administrator.
- Test a restriction by signing in as that user in a private browser window.

## Common mistakes

- Giving **Delete** to many roles. Cancel and amend is safer.
- Creating a user permission and forgetting it. A restricted user then wonders why records are missing.

## Troubleshooting

If a user gets *Not permitted*, check the role permission for the document type, then any user permissions. See Missing modules or permissions.

## Next steps

Read Example access setups.

## Related documentation

- Creating users and assigning roles
- Example access setups